smart task Attend

User Guide

SmartTask Attend: Web Client

Also see the SmartTask Attend: Mobile Device –User Guide

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Contact: 08700 707077 or email; info@skillweb.co.uk

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1 Introduction

SmartTask Attend is a simple to use proof of attendance solution.

The SmartTask Attend application is designed to capture data events when they happen, accurately, quickly, efficiently; and is specifically designed to take some hassle out of the working day.

The mobile devices running SmartTask Attend simply record the time spans of the User's shift and the visits they make to individual Customers during that shift. The start and end of shifts and visits are recorded, and uploaded to the Web Client where they can be displayed in real time and used for reporting and analysis.

SmartTask Attend is a modular based product and is available in several configurations which can be purchased to fit the individual needs of an organisation. Modules include:

1. Attendance
2. Incident reports
3. Customer portal
4. Rostering
5. GPS

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1.1 The Concept

By using the latest Near Field Communication (NFC) technology installed on a simple mobile phone, Users can simply swipe their phones on NFC tags or labels unique to the Customer to record arrival, departure and Checkpoints which are sent back to the Web Client in real-time. NFC tags can be encoded using the SmartTask Tag Writer Application.

Alternatively, the application can be installed on a mobile phone which has camera functionality to capture QR Codes® on location. SmartTask Attend captures the image and sends the encoded data back to the Web Client.

It is also possible to use SmartTask Attend with neither NFC tags nor QR Codes®, by manually inputting the required information, to record arrival or departure from a Customer location.

Even in areas with little or no connectivity, SmartTask Attend is able to store and then send the information once a connection is established with the mobile device.

The administrator is able to view the daily visits for Users as they occur, using the Web Client. The reporting function allows the creation of full attendance records including number of visits and total time of visits.

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About this guide

This guide explains the key activities with step by step visual instructions to support your recent training; and like stabilizers on a bike, the intention is for you to keep it with you until you feel confident enough to throw it away (or file it).

Hints

Hints and tips are provided throughout the guide as nuggets of information that aid your understanding of how SmartTask Attend works.

Warnings

Warnings are there to help prevent you from making unconscious mistakes.

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2 Log on to SmartTask

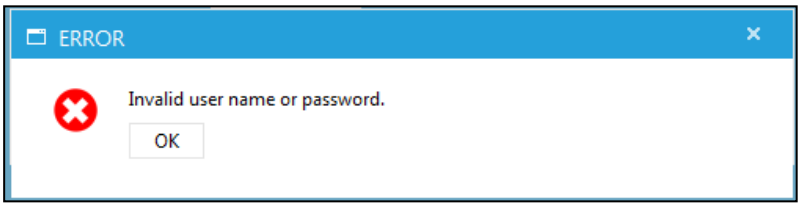
Accessing the system is via log on:

2.1 Initial Administrator log on

SmartTask is installed with an Administrator login to enable initial access to the application. It is recommended that the 'Administrator' account is not used for working practice. Additional users with Administrator privilege should be created (see Section ***4.2 Creating User logins***). This is a preventative measure, to safeguard against being locked out of the system after ten failed login attempts. Locked Users can then login as 'Administrator' and reactivate their account.

2.2 Failed log on

Ten failed log on attempts will lock the account and prevent further access. Only administrators of the system can reactivate locked accounts (see Section ***4.4 Activating & deactivating User logins***).



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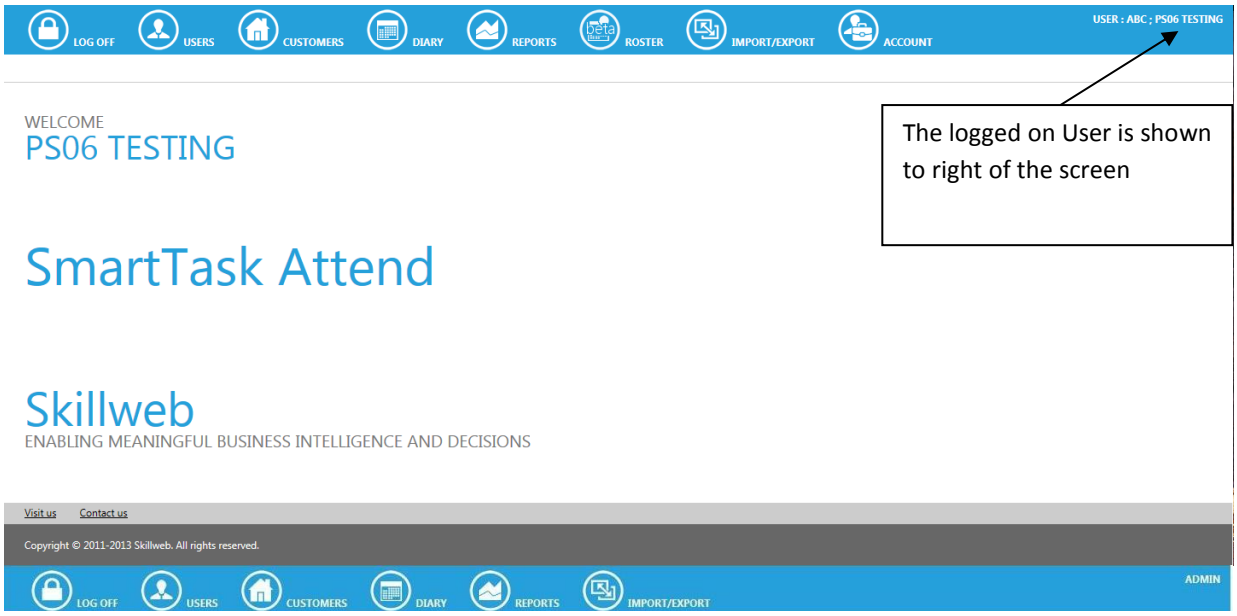
3 Welcome screen

After logon the welcome screen is displayed:



3.1 SmartTask Application Bar

This is the bar along the top of the screen which is always present and provides access to core application features. Clicking these buttons will navigate you to the appropriate feature. When navigation is complete the icon in that button will be orange.

3.2 The Command Bar

This is the bar along the top of the screen, under the application bar, which appears when a core function button is pressed in the application bar. It provides access to actions relevant only to that function. Each action button has a brief textual description to its right hand side.

Within Users view the Command bar displays:

Within Customer View the command bar displays:

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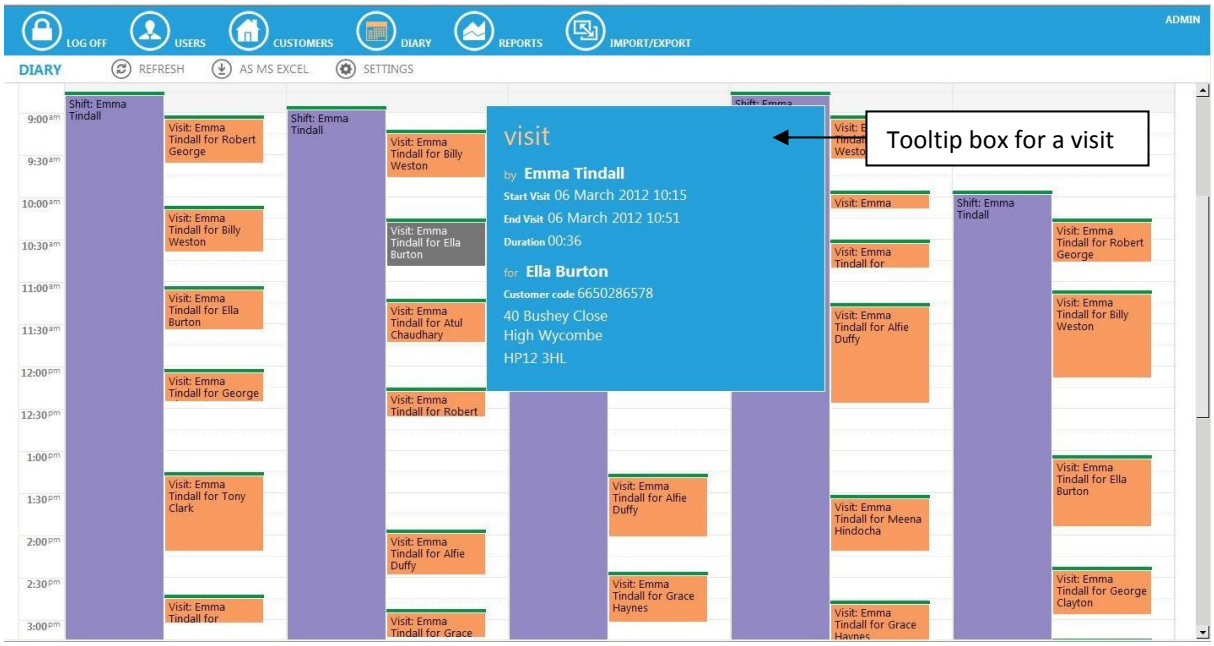
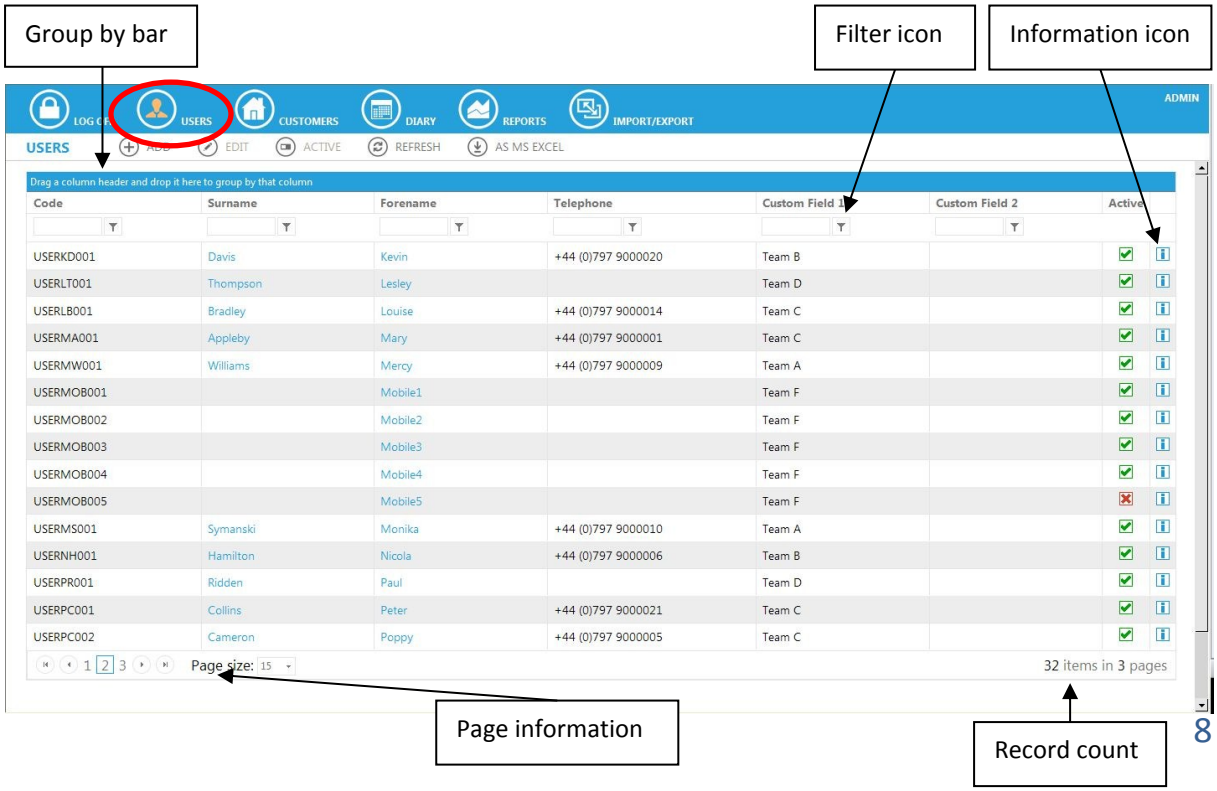
3.3 Tooltips

Some items within SmartTask Attend display short tooltip information about their function, when the cursor is placed over them (hover tooltips). Other items when clicked on, such as the Information icon in the User and Customer lists and appointment boxes in the Diary, display a tooltip box with further information. If the cursor is then moved away, they will be removed after a few seconds. However, if the cursor remains over the tooltip box, it will remain on the screen.



4 Users

On clicking the User Button, a list of all the SmartTask Attend Users is displayed.



4.1 Viewing the data

4.1.1 Sort by

The data can be sorted by a particular column, by clicking on the column header which sorts ascending (a small up arrow appears at the end of the column name). To sort descending, click on the column header or arrow again. To remove the sorting, click on the column header or arrow again.

4.1.2 Group by

To group the data by a column, drag and drop the column name into the blue bar above the column names. The data can be grouped by more than one field. To remove the grouping either click on the Close icon next to the column name or drag the column name out of the Grouping bar.

4.1.3 Filter by

Each column can be filtered, by keying the required filter parameter into the filter box and clicking on the filter icon. This gives a drop down box of filter functions. Select the required function and the data is filtered, leaving only the data that satisfies the criteria. To remove the filter, click on the filter icon and select the NOFILTER function.

4.1.4 Information icon

The information icon when clicked on, gives further information that is not displayed on the screen, within a tooltip box (see Section ***3.3 Tooltips***).

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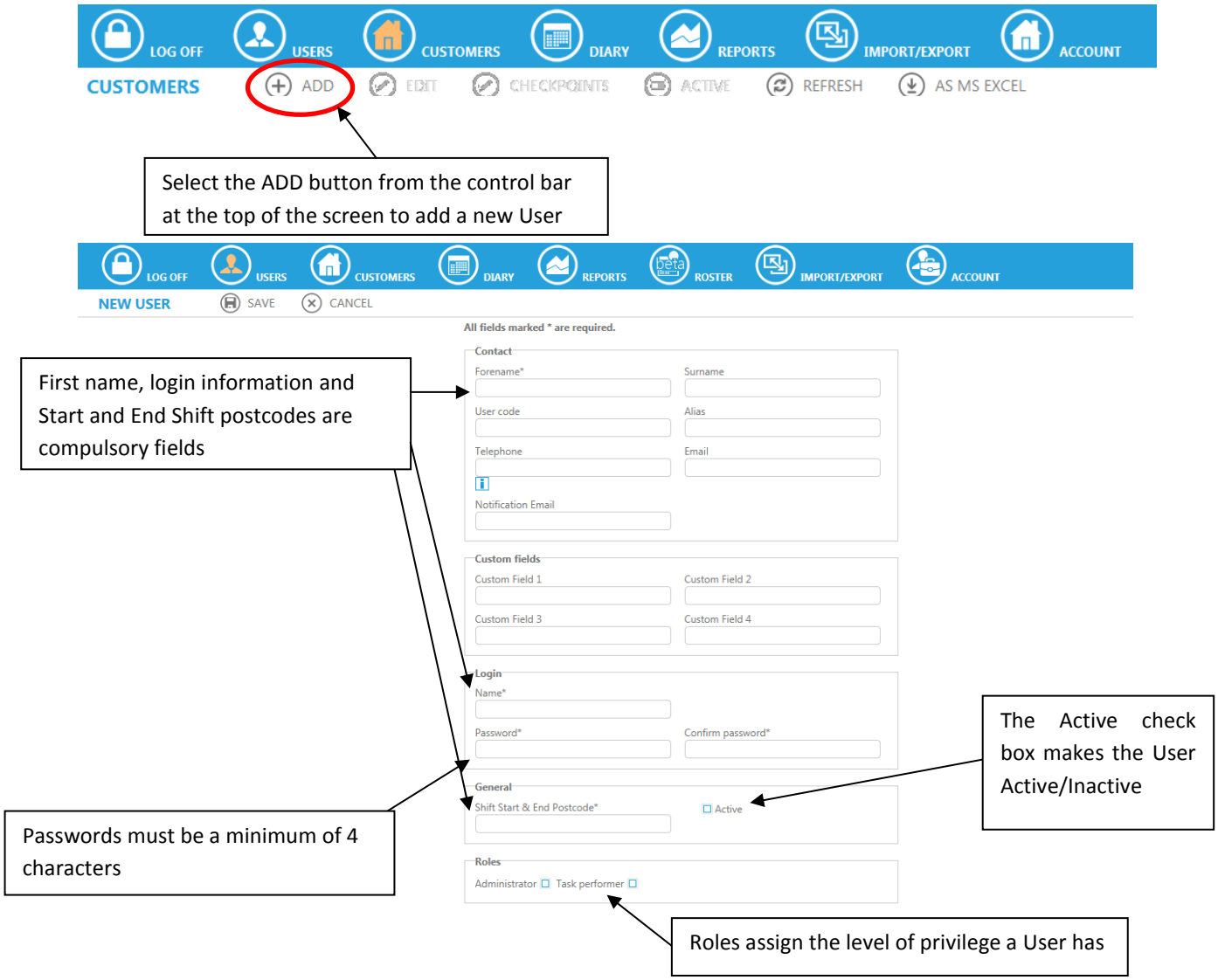
4.2 Creating User logins

The system requires User logins to be set up with the necessary privileges, to allow Users to log on to the SmartTask Attend Web Client and/or mobile device. As mentioned in Section ***2.1 Initial Administrator log on***, the 'Administrator' login should not be used for working practice and additional Users with Administrator privilege should be created at initial system set-up.



4.2.1 Compulsory fields

First name, login and password and Start and End Shift Postcodes (marked *) are required fields. If the User tries to save the record without any of these fields, an error box appears and any incomplete compulsory fields are flagged.

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4.2.2 Active check box

Leaving this box unchecked makes the User inactive and prevents log on. If a User is no longer employed or is on holiday or off sick, the Administrator may wish to make their login inactive. Inactive accounts can be subsequently made active again (see section ***4.4 Activating & deactivating User logins***).

4.2.3 Notification Email

The Notification Email field allows multiple email addresses to be saved per user record, when a user raises Live View Exceptions or Incidents, an email will be sent to the email addresses entered against the user that has created the exception/incident. Multiple email addresses must be entered in the format: test@test.com;test2@test.com

4.2.4 Roles

SmartTask has 2 roles which determine the access a User has to the application.

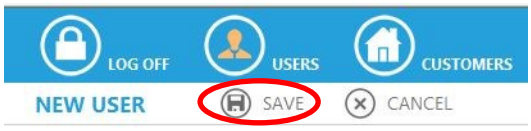
- **Administrator** role gives access to the Web Client. These Users are inhibited from logging on to a mobile device. The main function of a User with this role is to create and edit Users and Customers, and manage reporting, solely within in the Web Client.
- **Task Performer** role gives access to the mobile device in order to record Shifts, checkpoints and Visits to Customers.

Users can have either or both of these roles, giving access to SmartTask Attend on the mobile device, as well as the Web Client, if both roles are selected; the User has access to the Tag Writer application. If no roles are assigned, the User will be created but they will not be able to log on.

4.2.5 Saving the new User

Complete the fields and press the SAVE button in the Command menu, to save the details for the new User. The User list screen will then be displayed with the additional new User.

The CANCEL button will navigate back to the User list, without saving.



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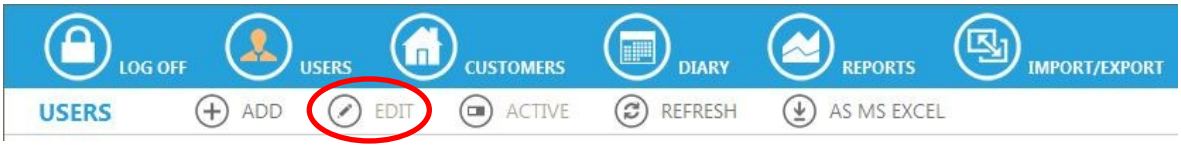
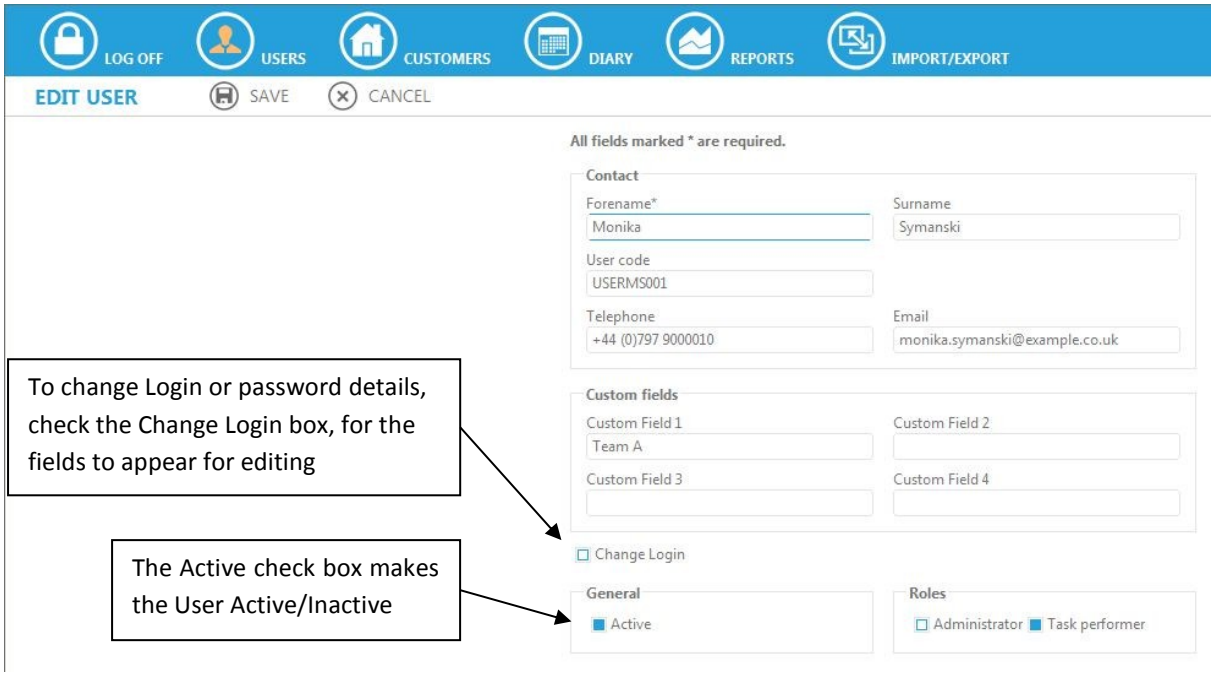
4.3 Edit User accounts

To edit any information for a User, highlight the User in the list by clicking on the record and press EDIT in the Command bar or double click on the required row.





Make the necessary changes and press SAVE in the Command bar to save the changes or CANCEL to discard any changes made, and navigate back to the User list.

4.3.1 Active check box

Unchecking this box makes the User inactive and prevents log on. If a User is no longer employed or is on holiday or off sick, the Administrator may wish to make their login inactive.

User accounts cannot be deleted, they can only be deactivated.

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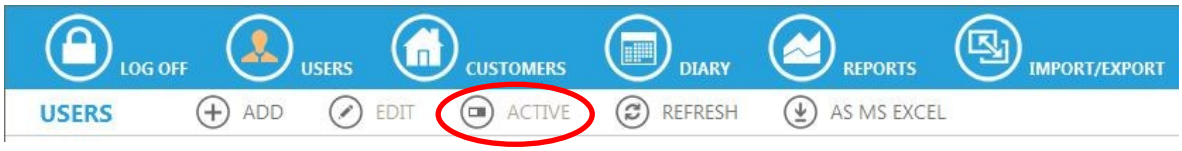
4.4 Activating & deactivating User logins



The Active column in the User list displays the Active status for a User:

Active

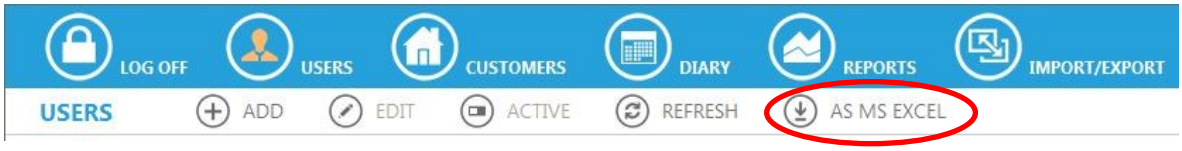
Inactive

Pressing the ACTIVE button in the command menu will switch the current status. The Active status can also be changed within the Edit function for a User (see Section ***4.3 Edit User accounts***).

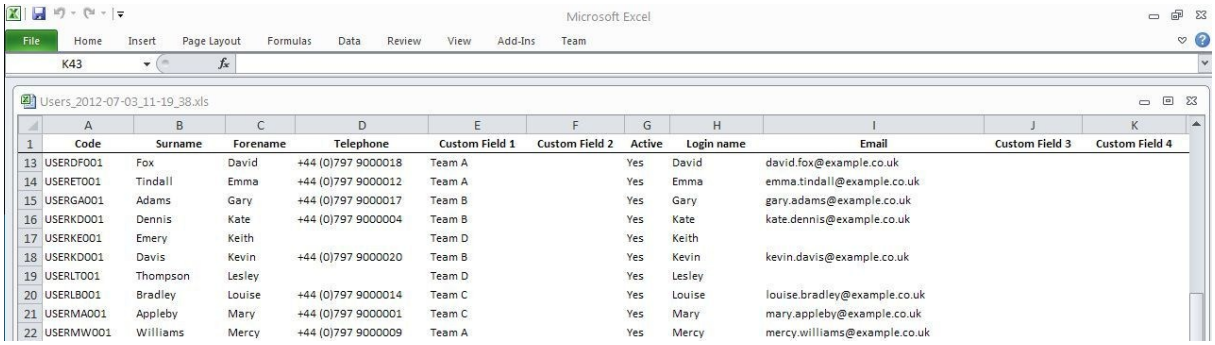
If the User has been deactivated due to ten failed log on attempts and cannot remember their password, then the login details will also have to be changed via the edit function (see Section ***4.3 Edit User accounts***).

Following account re-activation the User only has one attempt to log on correctly, otherwise the account will be locked again.

4.5 Downloading User data



To download all data fields for the displayed Users into Microsoft Excel, press the Download AS MS EXCEL button. The file can be opened or saved to a specified location.



	A	B	C	D	E	F	G	H	I	J	K
1	Code	Surname	Forename	Telephone	Custom Field 1	Custom Field 2	Active	Login name	Email	Custom Field 3	Custom Field 4
13	USERDF001	Fox	David	+44 (0)797 9000018	Team A		Yes	David	david.fox@example.co.uk		
14	USERET001	Tindall	Emma	+44 (0)797 9000012	Team A		Yes	Emma	emma.tindall@example.co.uk		
15	USERGA001	Adams	Gary	+44 (0)797 9000017	Team B		Yes	Gary	gary.adams@example.co.uk		
16	USERKD001	Dennis	Kate	+44 (0)797 9000004	Team B		Yes	Kate	kate.dennis@example.co.uk		
17	USERKE001	Emery	Keith		Team D		Yes	Keith			
18	USERKD001	Davis	Kevin	+44 (0)797 9000020	Team B		Yes	Kevin	kevin.davis@example.co.uk		
19	USERLT001	Thompson	Lesley		Team D		Yes	Lesley			
20	USERLB001	Bradley	Louise	+44 (0)797 9000014	Team C		Yes	Louise	louise.bradley@example.co.uk		
21	USERMA001	Appleby	Mary	+44 (0)797 9000001	Team C		Yes	Mary	mary.appleby@example.co.uk		
22	USERMW001	Williams	Mercy	+44 (0)797 9000009	Team A		Yes	Mercy	mercy.williams@example.co.uk		

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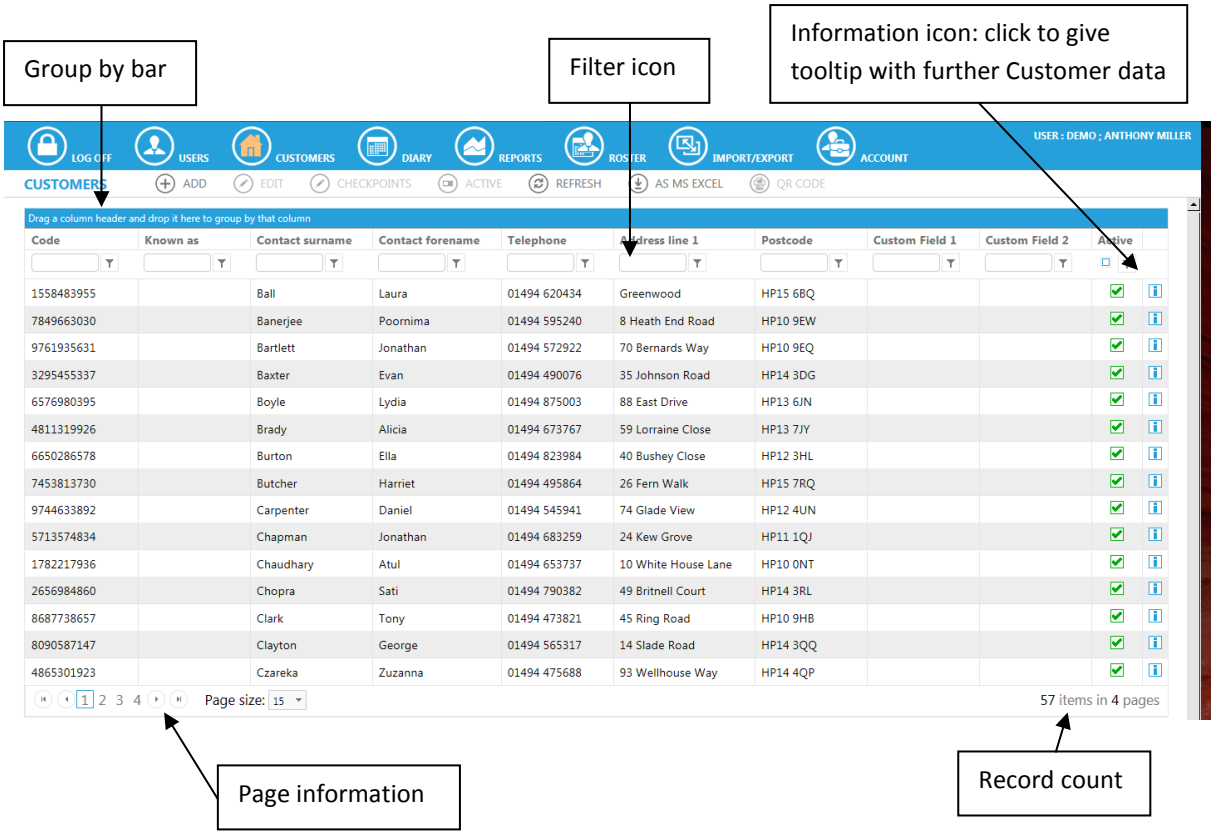
5 Customers

On clicking the Customers button, a list of all the SmartTask Attend Customers is displayed. The functionality for displaying the data required is the same as for Users (See Section ***4.1 Viewing the data***).


Group by bar
Filter icon
Information icon: click to give tooltip with further Customer data
LOG OFF
USERS
CUSTOMERS
DIARY
REPORTS
ROSTER
IMPORT/EXPORT
ACCOUNT
USER : DEMO ; ANTHONY MILLER
CUSTOMERS
ADD
EDIT
CHECKPOINTS
ACTIVE
REFRESH
AS MS EXCEL
QR CODE
Drag a column header and drop it here to group by that column
Code
Known as
Contact surname
Contact forename
Telephone
Address line 1
Postcode
Custom Field 1
Custom Field 2
Active
1558483955 Ball Laura 01494 620434 Greenwood HP15 6BQ
7849663030 Banerjee Poornima 01494 595240 8 Heath End Road HP10 9EW
9761935631 Bartlett Jonathan 01494 572922 70 Bernards Way HP10 9EQ
3295455337 Baxter Evan 01494 490076 35 Johnson Road HP14 3DG
6576980395 Boyle Lydia 01494 875003 88 East Drive HP13 6JN
4811319926 Brady Alicia 01494 673767 59 Lorraine Close HP13 7JY
6650286578 Burton Ella 01494 823984 40 Bushey Close HP12 3HL
7453813730 Butcher Harriet 01494 495864 26 Fern Walk HP15 7RQ
9744633892 Carpenter Daniel 01494 545941 74 Glade View HP12 4UN
5713574834 Chapman Jonathan 01494 683259 24 Kew Grove HP11 1QJ
1782217936 Chaudhary Atul 01494 653737 10 White House Lane HP10 0NT
2656984860 Chopra Sati 01494 790382 49 Britnell Court HP14 3RL
8687738657 Clark Tony 01494 473821 45 Ring Road HP10 9HB
8090587147 Clayton George 01494 565317 14 Slade Road HP14 3QQ
4865301923 Czareka Zuzanna 01494 475688 93 Wellhouse Way HP14 4QP
1 2 3 4
Page size: 15
57 items in 4 pages
Page information
Record count

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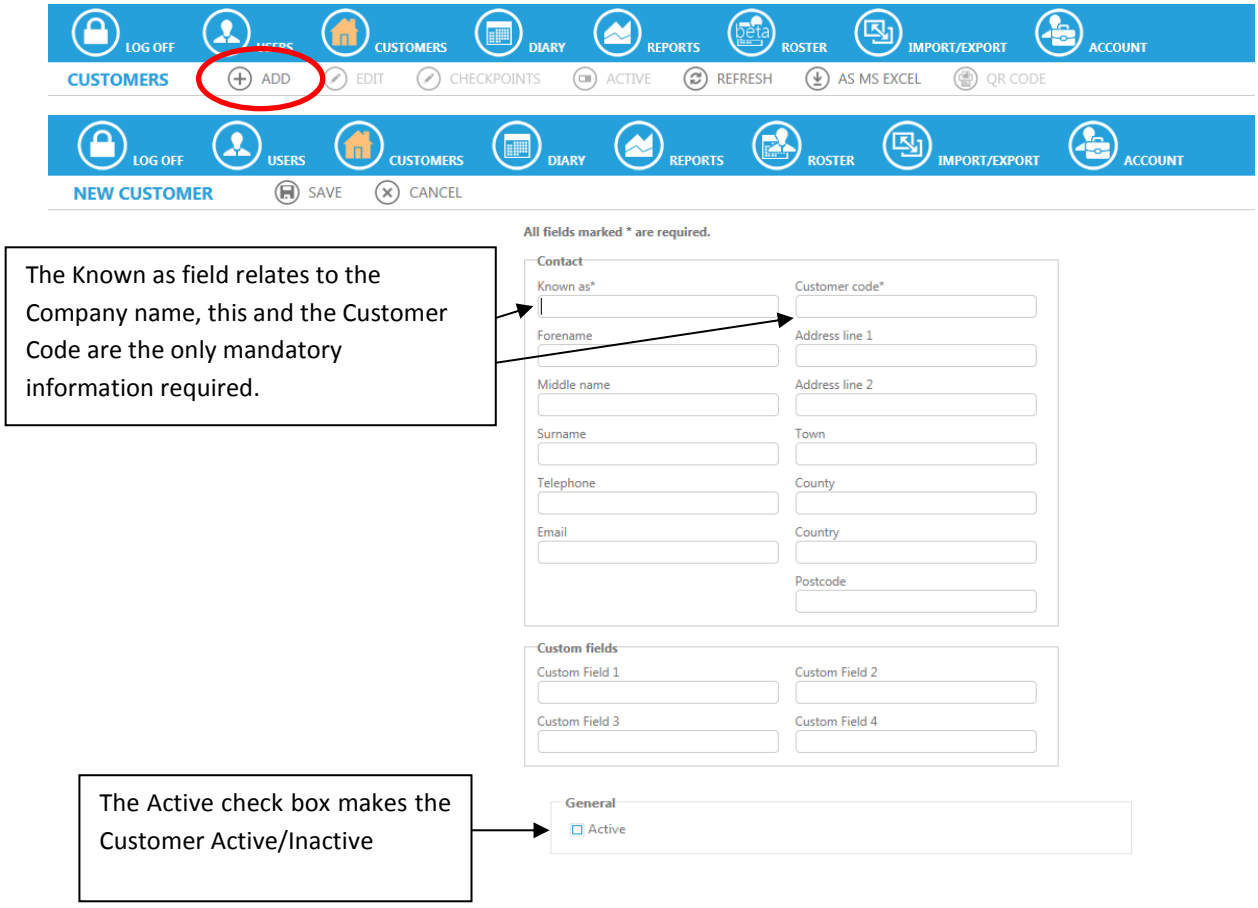
5.1 Creating a new Customer



5.1.1 Compulsory fields

Reference number (marked *) is a required field. This number should be unique to each Customer. If the User tries to save the record without this field, an error box appears and any incomplete compulsory fields are flagged.

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5.1.2 Tag Info Fields

When adding a new Customer, a user can enter information that is unique to the customer which will display or activate when the QR Code / NFC tag is read.

5.1.3 Customer Logon

Each time a new customer is created, a unique Log on URL and password are generated, this allows you provide your client with access to everything that has been undertaken at their site.

5.1.4 Active check box

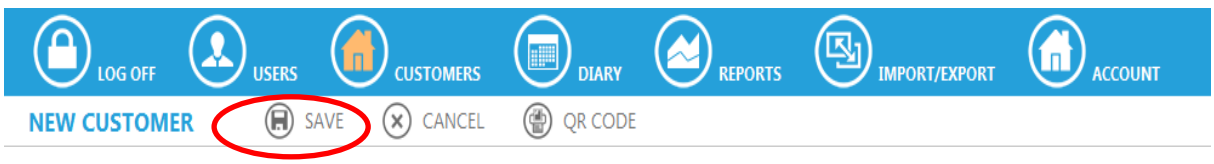
Leaving this box unchecked makes the Customer inactive and not available to the SmartTask Attend application.

Customers cannot be deleted, they can only be deactivated.

5.1.5 Saving the new Customer

Complete the fields and press the SAVE button in the Command bar, to save the details for the new Customer. The Customer list screen will then be displayed with the additional new Customer.

The Cancel button will clear the data from any fields which have been completed, without saving.



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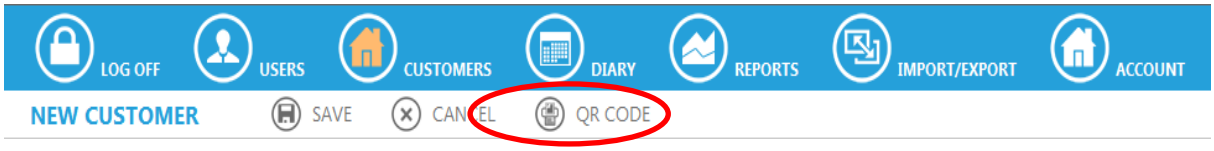
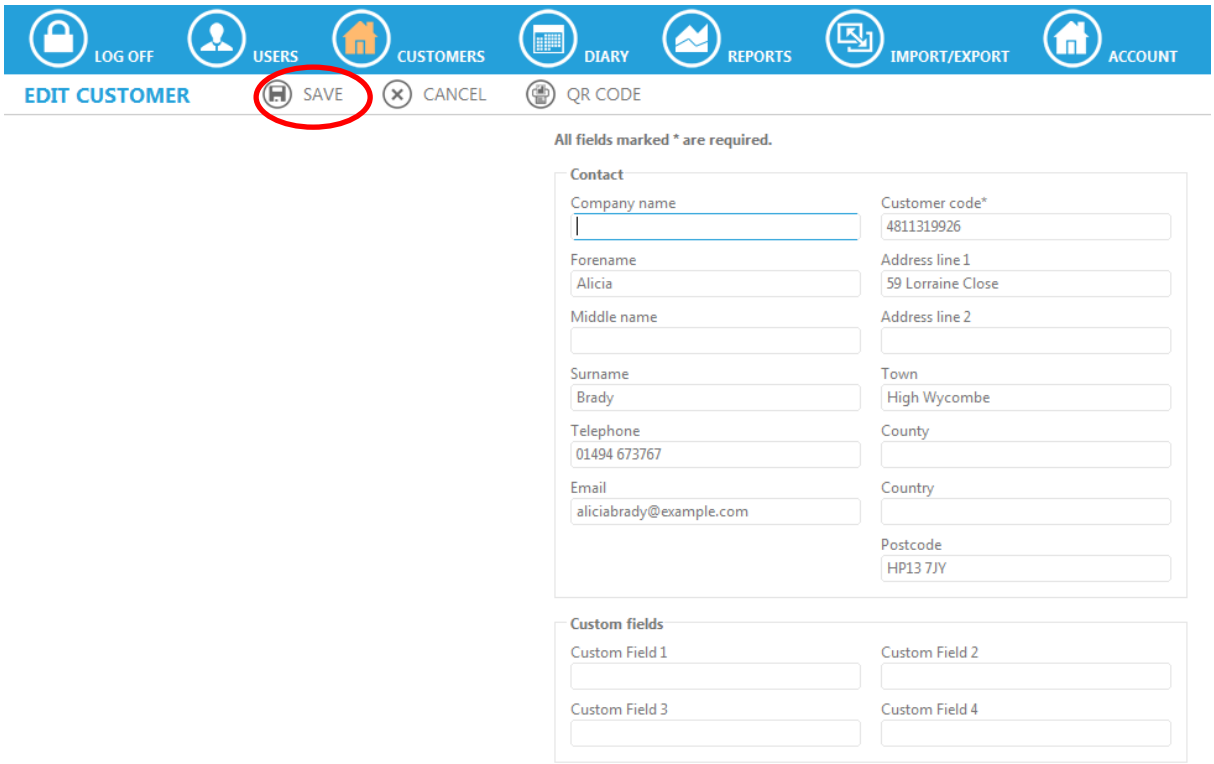
5.1.6 Printing QR Codes®

With both adding and editing a Customer or from the Customer list, a QR Code® can be created for that Customer, based on the unique Reference number, by pressing QR CODE in the Command bar. This will open a popup window or a new tab depending on how the internet browser is configured. From there the QR Code® can be printed using the internet browser functionality.



5.2 Edit Customer

To edit any information for a Customer, highlight the Customer in the list by clicking on the record and press EDIT in the Command bar or double click on the required row.



Make the necessary changes and press SAVE in the Command bar to save the changes or CANCEL to discard any changes made, and navigate back to the Customer list.

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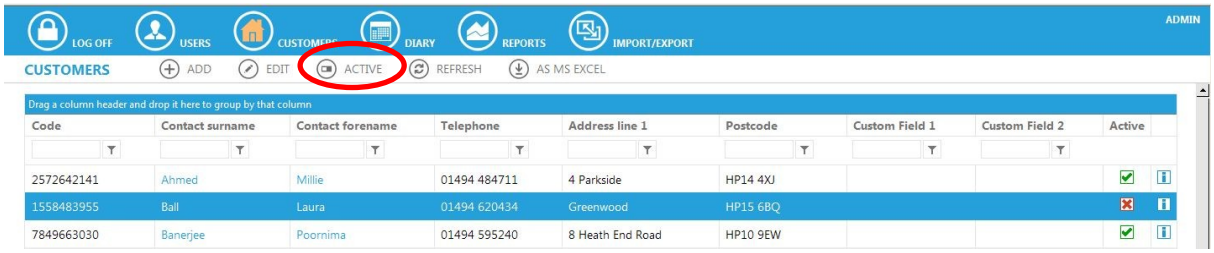
5.3 Activating & deactivating Customers

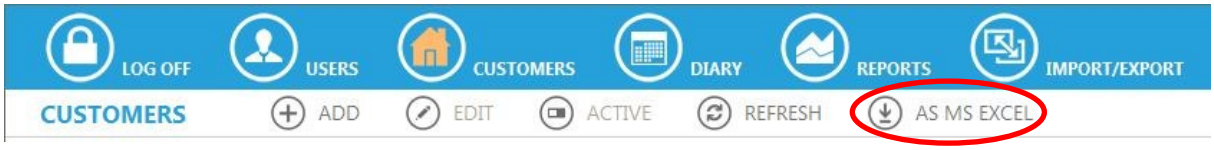
The Active column in the Customer list displays the Active status: a green tick denotes active and a red cross denotes inactive. Select the required Customer and press the ACTIVE button in the command menu to switch the current status.



The Active status can also be changed within the Edit function for a Customer (see Section ***5.2 Edit Customer***).

5.4 Downloading Customer data

To download all data fields for the displayed Customers into Microsoft Excel, press the Download AS MS EXCEL button. The file can be opened or saved to a specified location.



5.5 Checkpoints

Checkpoints can be set up within a visit and can be tied either to a customer or to the main account; Checkpoints are a way of recording an activity within a visit, an example of this might be a user arriving at a location that contains multiple areas to record attendance.

Checkpoints can be written to QR Barcodes / NFC tags using the handheld device.

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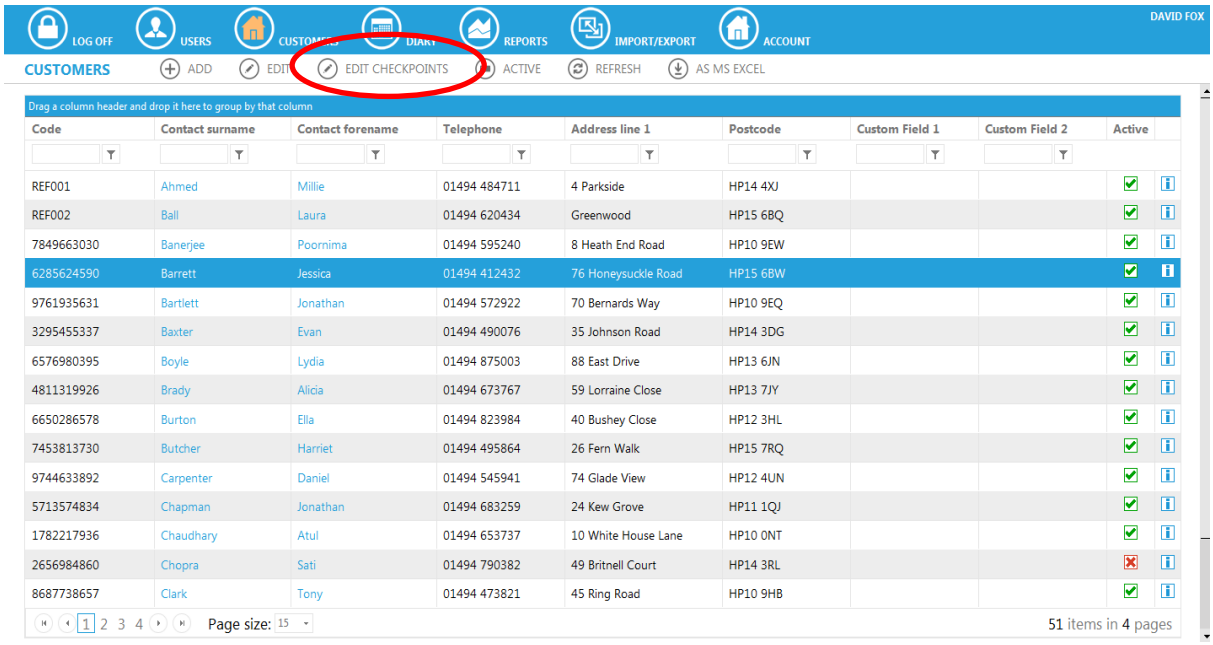
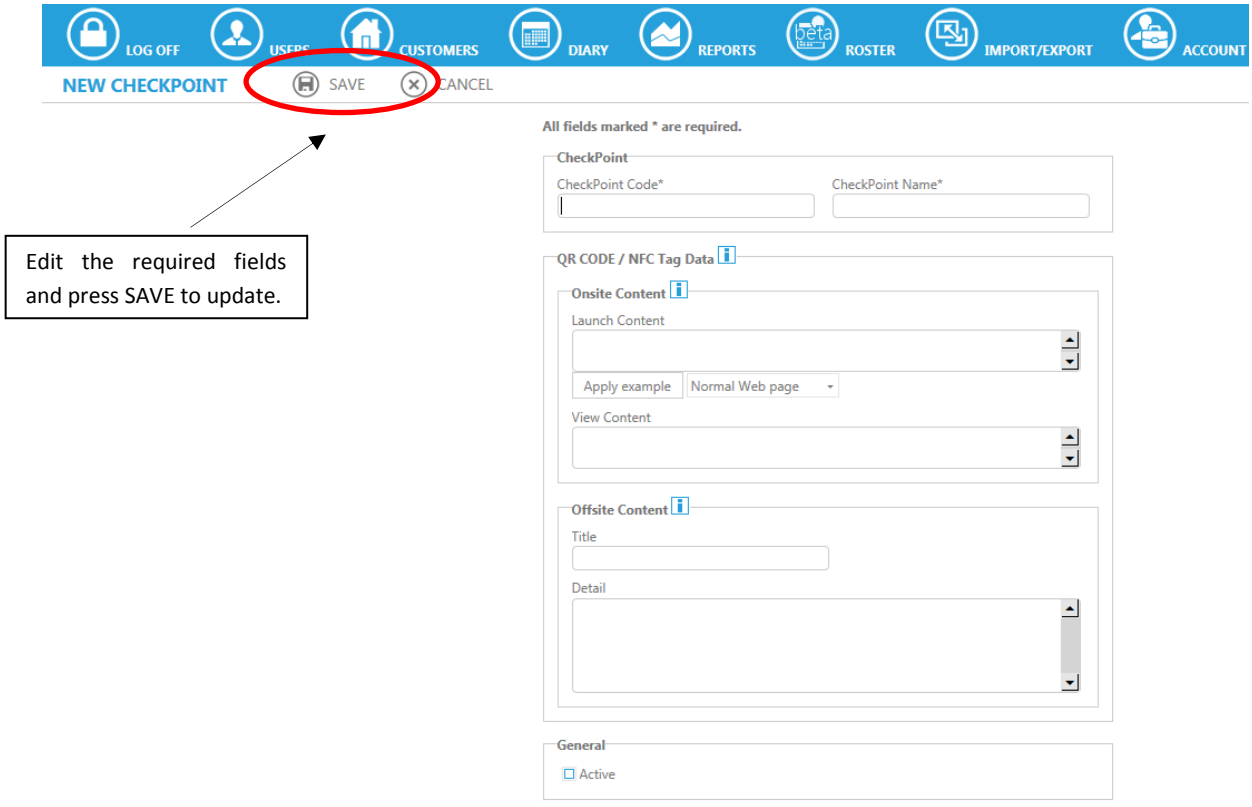
5.6 Creating a Customer checkpoint

To set up checkpoints at Customer level, from the Customer list select the required Customer and press the Edit Checkpoints icon.


LOG OFF
USERS
CUSTOMERS
DIARY
REPORTS
IMPORT/EXPORT
ACCOUNT
DAVID FOX
CUSTOMERS
ADD
EDIT
EDIT CHECKPOINTS
ACTIVE
REFRESH
AS MS EXCEL
Drag a column header and drop it here to group by that column
Code | Contact surname | Contact forename | Telephone | Address line 1 | Postcode | Custom Field 1 | Custom Field 2 | Active
REF001 | Ahmed | Millie | 01494 484711 | 4 Parkside | HP14 4XJ
REF002 | Ball | Laura | 01494 620434 | Greenwood | HP15 6BQ
7849663030 | Banerjee | Poornima | 01494 595240 | 8 Heath End Road | HP10 9EW
6285624590 | Barrett | Jessica | 01494 412432 | 76 Honeysuckle Road | HP15 6BW
9761935631 | Bartlett | Jonathan | 01494 572922 | 70 Bernards Way | HP10 9EQ
3295455337 | Baxter | Evan | 01494 490076 | 35 Johnson Road | HP14 3DG
6576980395 | Boyle | Lydia | 01494 875003 | 88 East Drive | HP13 6JN
4811319926 | Brady | Alicia | 01494 673767 | 59 Lorraine Close | HP13 7JY
6650286578 | Burton | Ella | 01494 823984 | 40 Bushey Close | HP12 3HL
7453813730 | Butcher | Harriet | 01494 495864 | 26 Fern Walk | HP15 7RQ
9744633892 | Carpenter | Daniel | 01494 545941 | 74 Glade View | HP12 4UN
5713574834 | Chapman | Jonathan | 01494 683259 | 24 Kew Grove | HP11 1QJ
1782217936 | Chaudhary | Atul | 01494 653737 | 10 White House Lane | HP10 0NT
2656984860 | Chopra | Sati | 01494 790382 | 49 Britnell Court | HP14 3RL
8687738657 | Clark | Tony | 01494 473821 | 45 Ring Road | HP10 9HB
1 2 3 4
Page size: 15
51 items in 4 pages

A new screen will appear allowing entry of Checkpoints to the Customer, press the ADD icon



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On the resultant screen, enter the information relating to the Checkpoint you wish to create, Checkpoint Code and Name are the only fields which require a mandatory entry. – denoted with an *

The Tag Info Fields relate to the information that can be shown on the device:

- *On Site Info URL* – this field can be populated with a website address that provides information to the user.
- *On Site Info Text* – When entered will display information relating to the checkpoint – i.e. knock loudly.
- *Off Site Lookup Title* and *Off Site Lookup Body* – (think of these as a book title and the body being the paragraph) entry in these fields will display information to the user that can be changed as and when needed, without the need to re encode Tags.

Once the Information has been entered, press the Save icon to update.

On Site information fields, once encoded to QR/NFC tags cannot be changed unless the tag is deleted and then re-encoded with the changed information.

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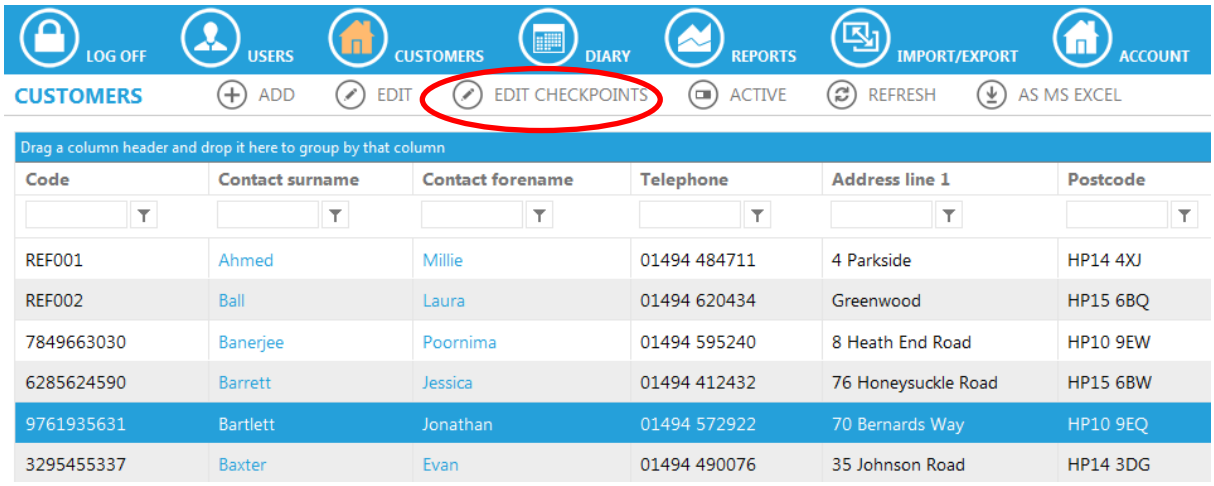
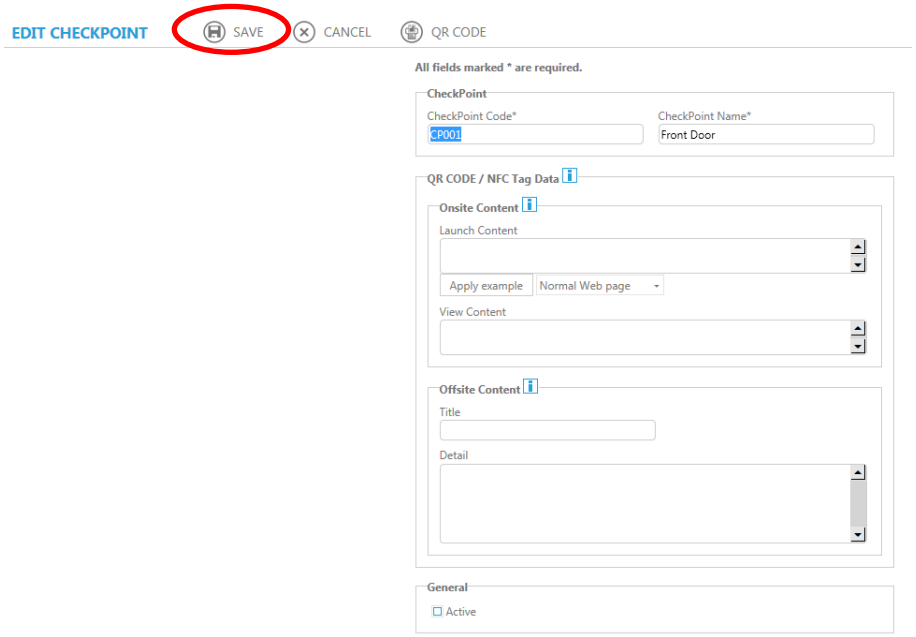
5.7 Editing a Customer Checkpoint

Customer Checkpoints can be Edited by selecting the Customer with which the checkpoint to be edited is associated.



Select the Customer required and then selects the EDIT CHECKPOINTS icon.

The EDIT CHECKPOINT screen will display:



Once the required changes have been made, select the SAVE icon and the information will be saved.

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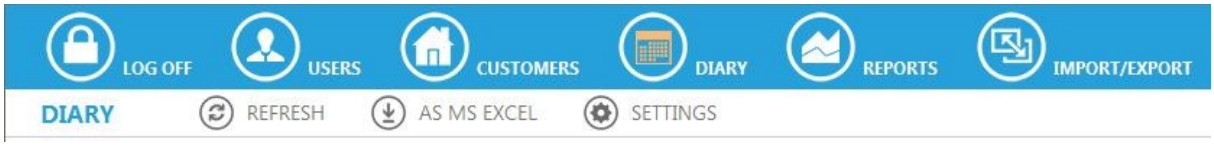
6 Diary

The Diary shows details of Users' shifts and/or visits to Customers, in a calendar format.



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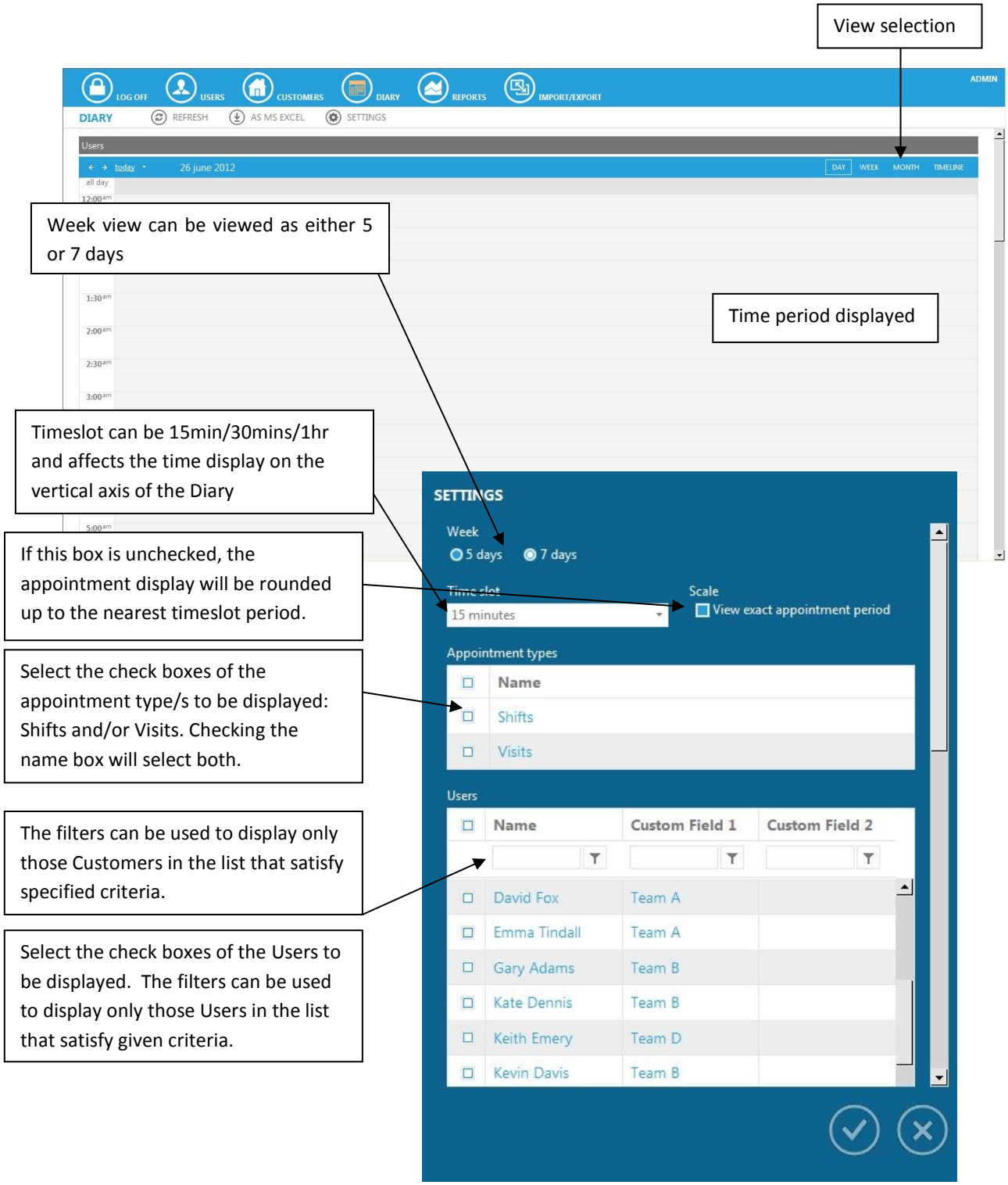
6.1 Diary Display

A variety of views are available within the diary functionality:

- Day view
- Week view
- Month view
- Timeline view



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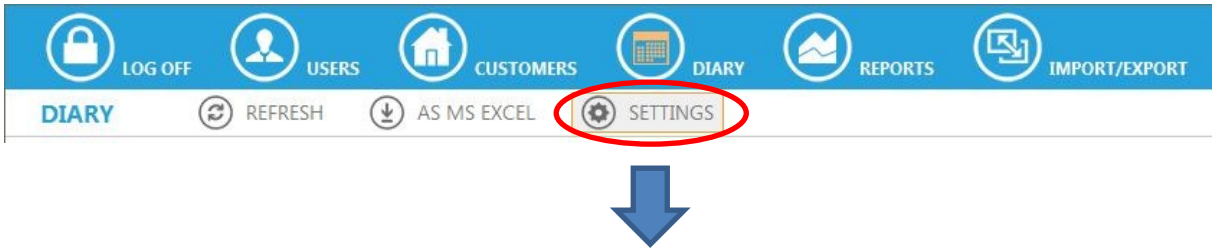
6.2 Diary settings



Click on the User's check box to select it **in addition** to those already selected. Clicking anywhere on a row will select that row and deselect any rows previously selected.

To select a range of Users, hold the Shift key and select the User at the top and bottom of the required range.

When the settings are selected:

- To remove the Settings box and display the data: press the tick button.
- To remove the Settings box and cancel any setting changes: press the close button.
- To keep the Settings box on the screen and display the data: press the REFRESH button in the Command bar.

While the Settings box is on the screen, the SETTINGS button in the Command menu is highlighted with an orange surround. The box can be removed without any changes applied by clicking this off.

6.3 Appointment display

The example below shows a 5 day week view of Shifts and Visits for User Emma Tindall.

- Shifts are coloured purple
- Visits are coloured orange
- Appointments (Shifts or Visits) which have a start and an end recorded, have a green line above them
- Appointments which are currently open, or for some reason have failed to have an end recorded, have a red line above them
- Full information concerning the appointment can be displayed in a popup box by clicking on it

If the cursor is moved off the popup box it will be removed from the screen in a few seconds. To keep it on the screen, keep the cursor within the box.

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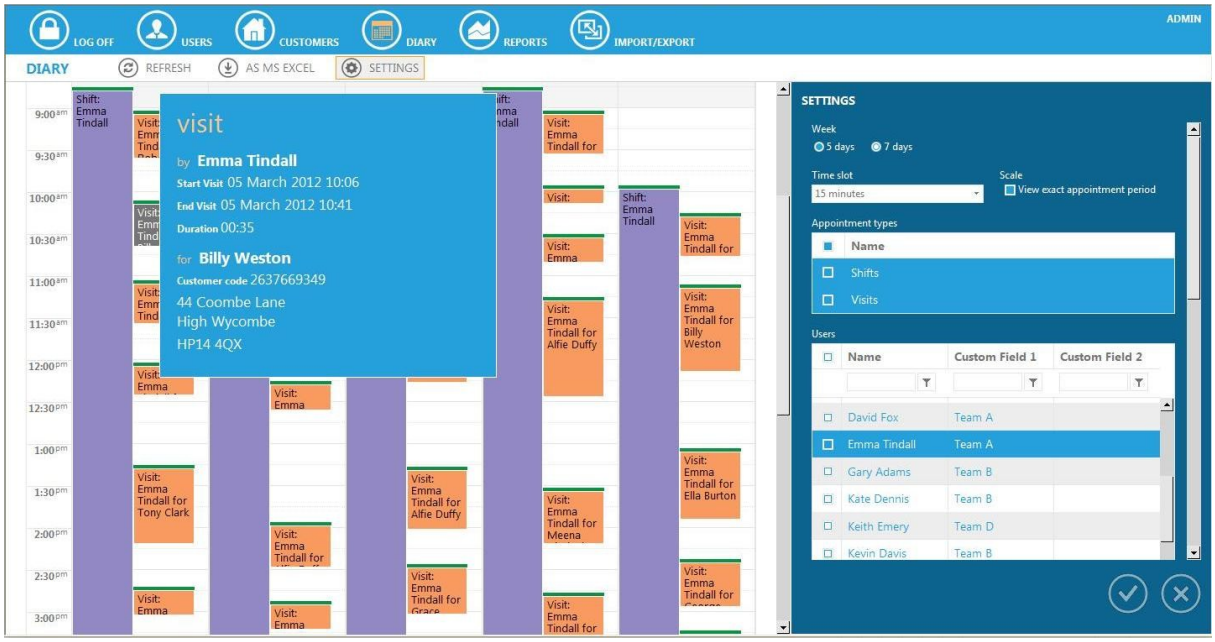
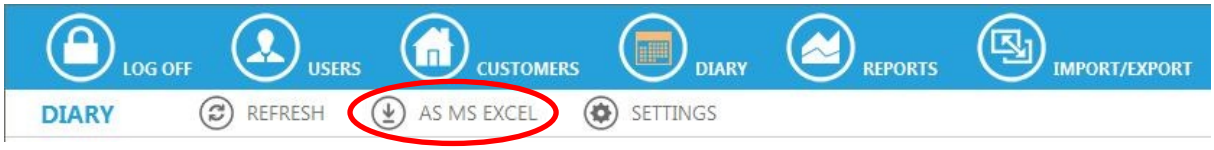


6.4 Downloading Appointment data



To download the displayed data into Microsoft Excel, press the Download AS MS EXCEL button in the Command bar. The file can be opened or saved to a specified location.

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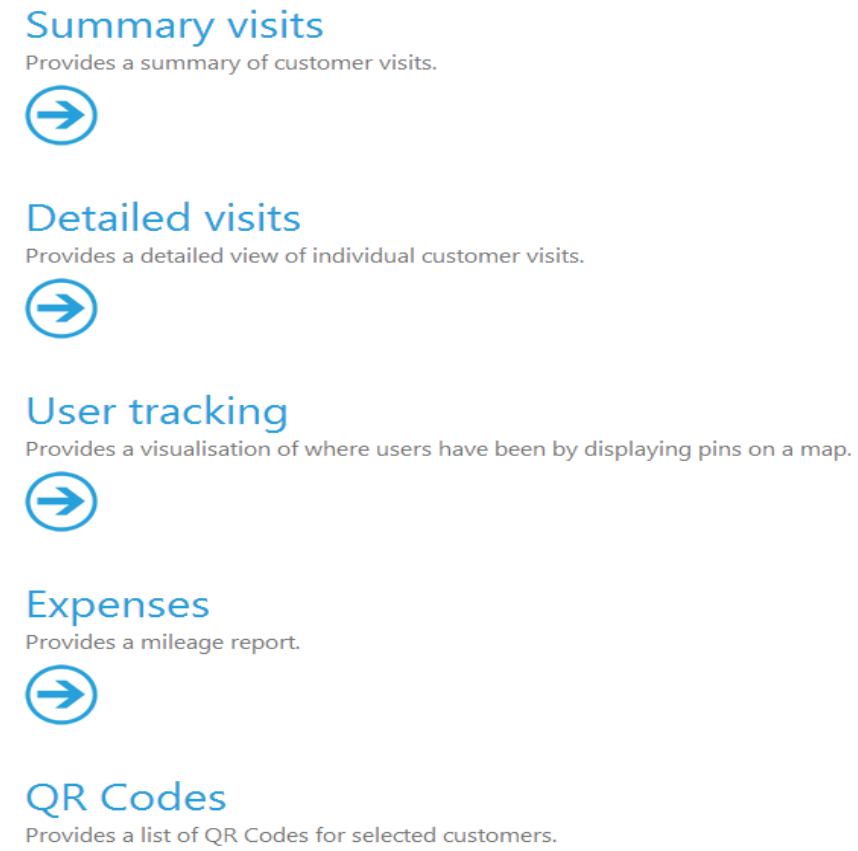
7 Reports

SmartTask Attend Reports can be used as tools to determine the length of time spent with a Customer or the length of time a User has carried out care during a selected time period.

To open the report selection page, press the REPORTS button in the Application bar:


Summary visits
Provides a summary of customer visits.
Detailed visits
Provides a detailed view of individual customer visits.
User tracking
Provides a visualisation of where users have been by displaying pins on a map.
Expenses
Provides a mileage report.
QR Codes
Provides a list of QR Codes for selected customers.

To navigate directly to a particular report, select the report type from the drop down menu that appears when the cursor is held over the REPORTS button.

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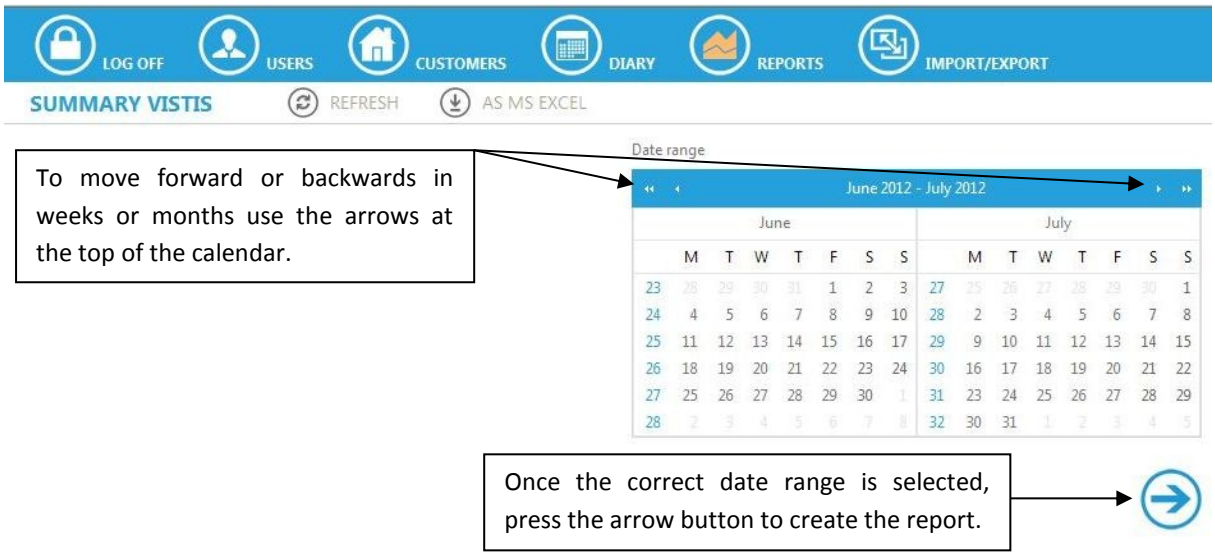
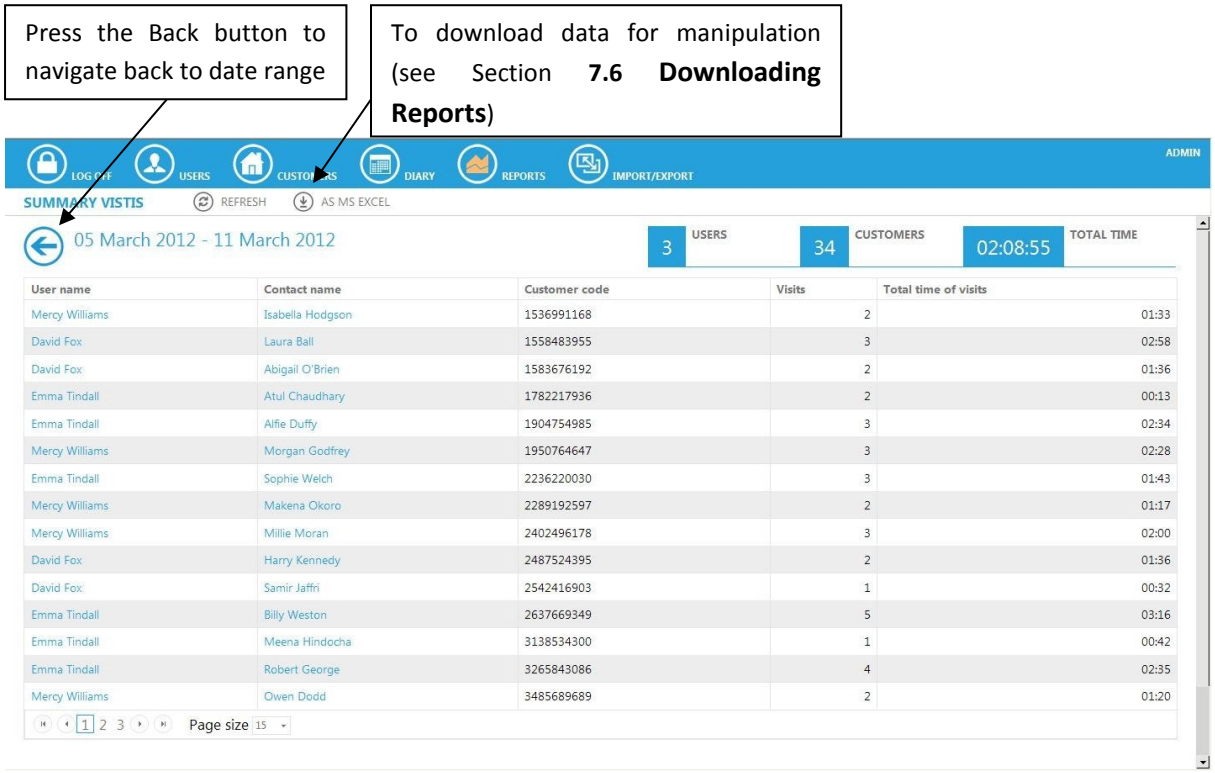
7.1 Summary Visits Report

This reports for the specified time range, a summary of the total time spent with and the number of visits to a Customer by a particular User.

A date selection screen is displayed. Select the date range required by clicking on the start date and the end date required for the report. The selection will be highlighted blue:





User name	Contact name	Customer code	Visits	Total time of visits
Mercy Williams	Isabella Hodgson	1536991168	2	01:33
David Fox	Laura Ball	1558483955	3	02:58
David Fox	Abigail O'Brien	1583676192	2	01:36
Emma Tindall	Atul Chaudhary	1782217936	2	00:13
Emma Tindall	Alfie Duffy	1904754985	3	02:34
Mercy Williams	Morgan Godfrey	1950764647	3	02:28
Emma Tindall	Sophie Welch	2236220030	3	01:43
Mercy Williams	Makena Okoro	2289192597	2	01:17
Mercy Williams	Millie Moran	2402496178	3	02:00
David Fox	Harry Kennedy	2487524395	2	01:36
David Fox	Samir Jaffri	2542416903	1	00:32
Emma Tindall	Billy Weston	2637669349	5	03:16
Emma Tindall	Meena Hindocha	3138534300	1	00:42
Emma Tindall	Robert George	3265843086	4	02:35
Mercy Williams	Owen Dodd	3485689689	2	01:20

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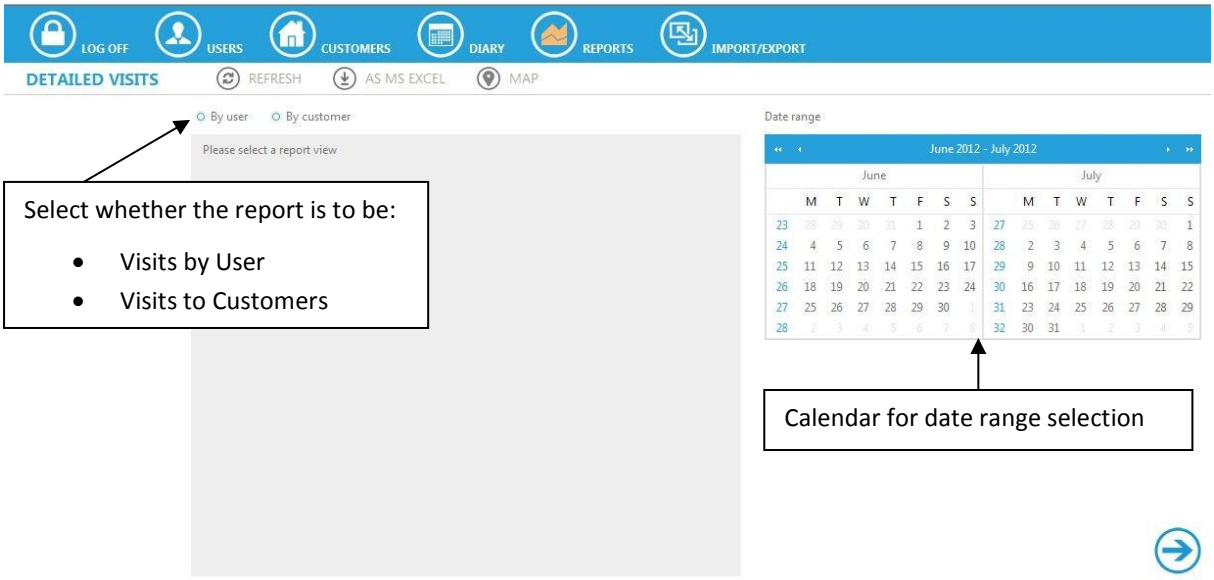
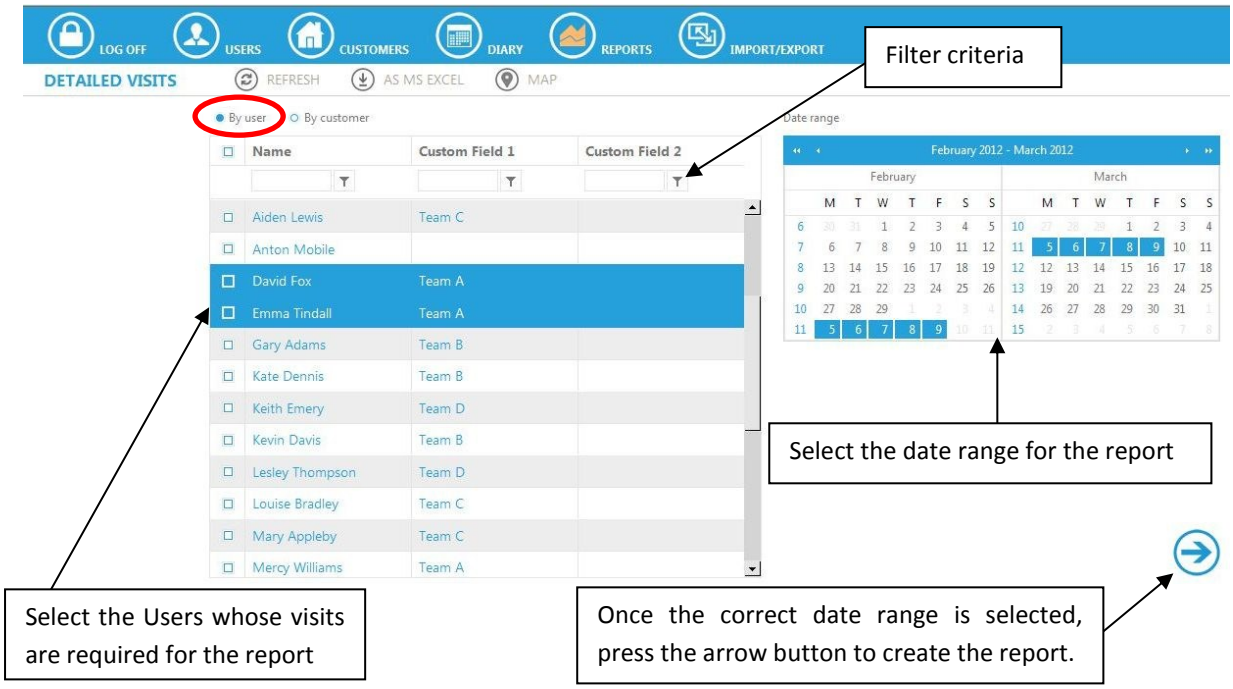
7.2 Detailed Visits Report

Provides a detailed view of individual visits to Customers, grouped either by User or Customer.



7.2.1 Detailed Visits Report by Users

Select the By User radio button and a list of all Users will display. This list can be filtered to specified criteria.



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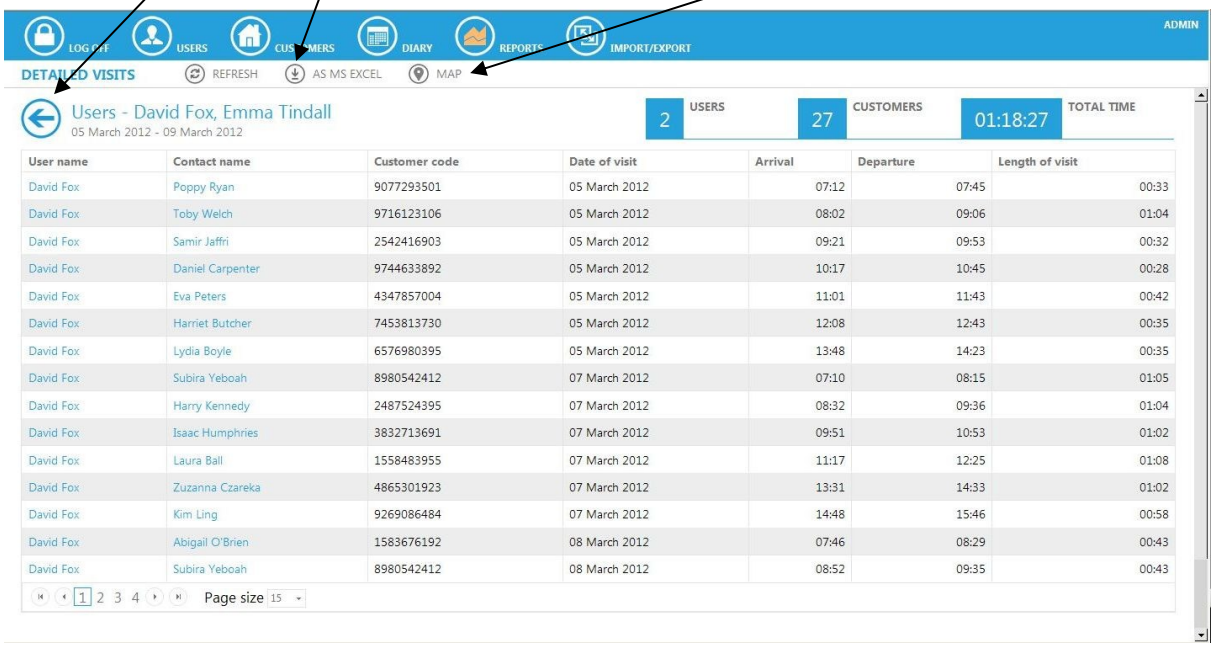
Press the Back button to navigate back to criteria selection

To download data for manipulation (see Section 7.6 Downloading Reports)

To view the Visits on a map (see Section ***7.2.4 Mapping Detailed Visit Reports***)



User name	Contact name	Customer code	Date of visit	Arrival	Departure	Length of visit
David Fox	Poppy Ryan	9077293501	05 March 2012	07:12	07:45	00:33
David Fox	Toby Welch	9716123106	05 March 2012	08:02	09:06	01:04
David Fox	Samir Jaffri	2542416903	05 March 2012	09:21	09:53	00:32
David Fox	Daniel Carpenter	9744633892	05 March 2012	10:17	10:45	00:28
David Fox	Eva Peters	4347857004	05 March 2012	11:01	11:43	00:42
David Fox	Harriet Butcher	7453813730	05 March 2012	12:08	12:43	00:35
David Fox	Lydia Boyle	6576980395	05 March 2012	13:48	14:23	00:35
David Fox	Subira Yeboah	8980542412	07 March 2012	07:10	08:15	01:05
David Fox	Harry Kennedy	2487524395	07 March 2012	08:32	09:36	01:04
David Fox	Isaac Humphries	3832713691	07 March 2012	09:51	10:53	01:02
David Fox	Laura Ball	1558483955	07 March 2012	11:17	12:25	01:08
David Fox	Zuzanna Czareka	4865301923	07 March 2012	13:31	14:33	01:02
David Fox	Kim Ling	9269086484	07 March 2012	14:48	15:46	00:58
David Fox	Abigail O'Brien	1583676192	08 March 2012	07:46	08:29	00:43
David Fox	Subira Yeboah	8980542412	08 March 2012	08:52	09:35	00:43

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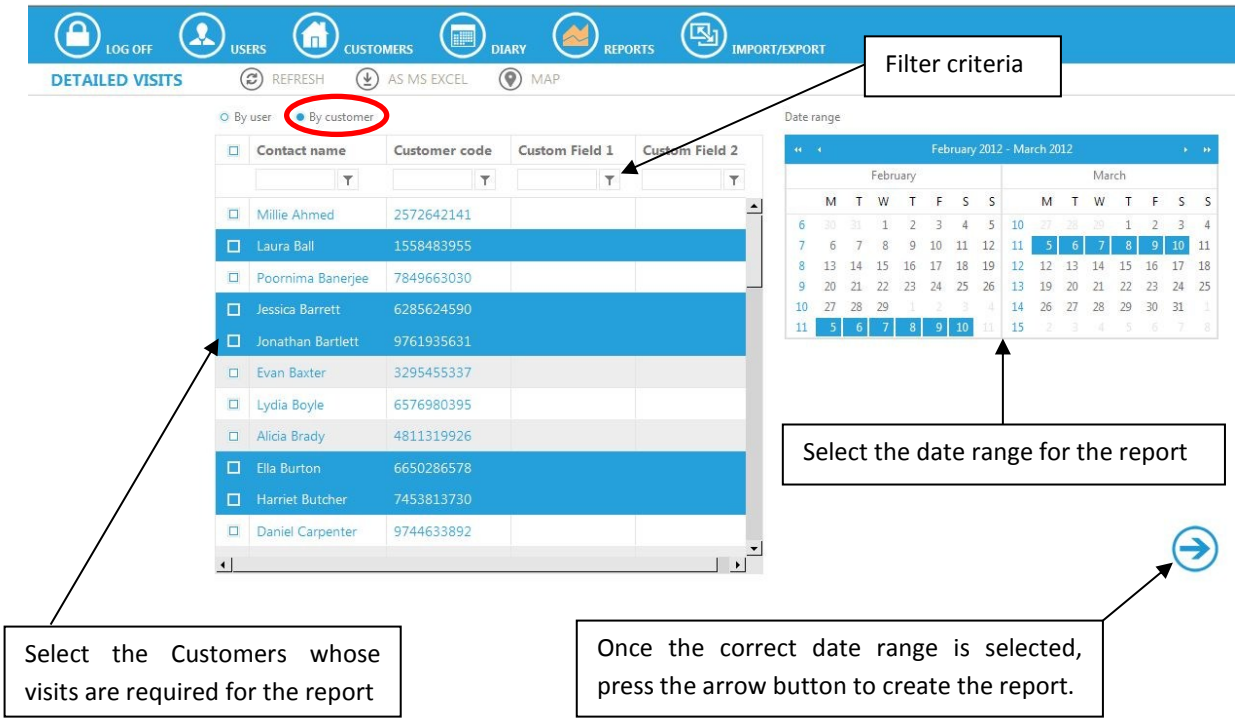
7.2.2 Detailed Visits Report by Customer

Select the By Customer radio button and a list of all Customers will display. This list can be filtered to specified criteria.



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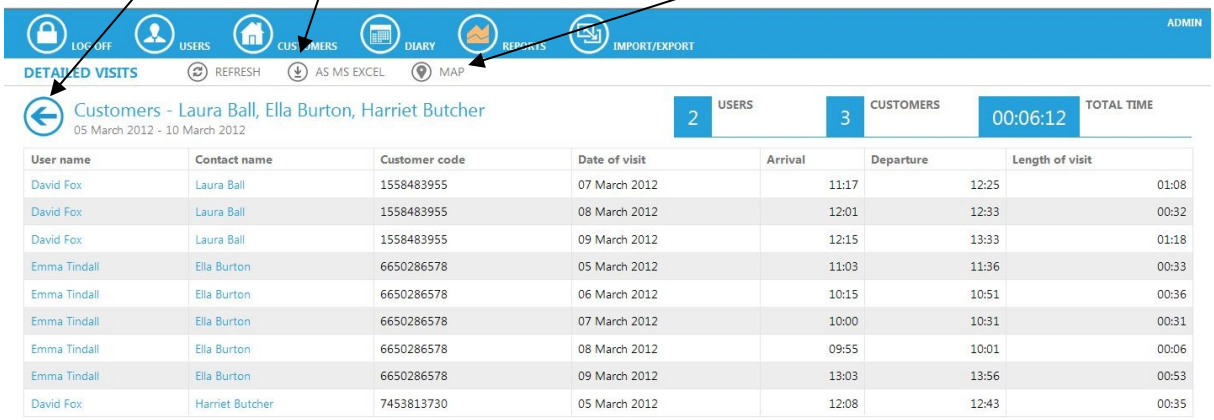
Press the Back button to navigate back to criteria selection

To download data for manipulation (see Section ***7.6 Downloading Reports***)

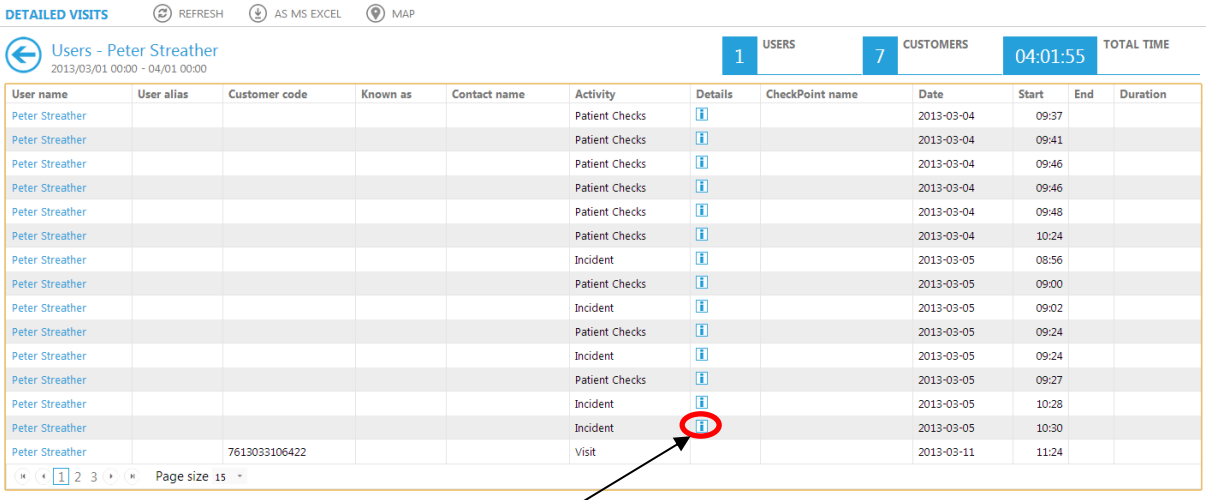
To view the Visits on a map (see Section ***7.2.4 Mapping Detailed Visit Reports***)



User name	Contact name	Customer code	Date of visit	Arrival	Departure	Length of visit
David Fox	Laura Ball	1558483955	07 March 2012	11:17	12:25	01:08
David Fox	Laura Ball	1558483955	08 March 2012	12:01	12:33	00:32
David Fox	Laura Ball	1558483955	09 March 2012	12:15	13:33	01:18
Emma Tindall	Ella Burton	6650286578	05 March 2012	11:03	11:36	00:33
Emma Tindall	Ella Burton	6650286578	06 March 2012	10:15	10:51	00:36
Emma Tindall	Ella Burton	6650286578	07 March 2012	10:00	10:31	00:31
Emma Tindall	Ella Burton	6650286578	08 March 2012	09:55	10:01	00:06
Emma Tindall	Ella Burton	6650286578	09 March 2012	13:03	13:56	00:53
David Fox	Harriet Butcher	7453813730	05 March 2012	12:08	12:43	00:35

7.2.3 Detailed Visit Report – Incidents

The detailed Visits Report will show any Incidents that a user has recorded on their mobile handset, these appear as below and the information can be drilled into by left clicking on the tooltip displayed:



User name	User alias	Customer code	Known as	Contact name	Activity	Details	CheckPoint name	Date	Start	End	Duration
Peter Streather					Patient Checks			2013-03-04	09:37		
Peter Streather					Patient Checks			2013-03-04	09:41		
Peter Streather					Patient Checks			2013-03-04	09:46		
Peter Streather					Patient Checks			2013-03-04	09:46		
Peter Streather					Patient Checks			2013-03-04	09:48		
Peter Streather					Patient Checks			2013-03-04	10:24		
Peter Streather					Incident			2013-03-05	08:56		
Peter Streather					Patient Checks			2013-03-05	09:00		
Peter Streather					Incident			2013-03-05	09:02		
Peter Streather					Patient Checks			2013-03-05	09:24		
Peter Streather					Incident			2013-03-05	09:24		
Peter Streather					Patient Checks			2013-03-05	09:27		
Peter Streather					Incident			2013-03-05	10:28		
Peter Streather					Incident			2013-03-05	10:30		
Peter Streather		7613033106422			Visit			2013-03-11	11:24		

1 2 3 Page size 15

The Administrator can "Drill" into the Incident Information by simply left clicking on the tooltip circled in the example.

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The information is displayed as:

TASK RESPONSES - INCIDENT REFRESH AS PDF

User : Peter Streather Alias :
2013/01/05 10:00

3 STEP COUNT

Name : Incident - 3

Stage	Step Title	Response Given	Prompt
1.1	Incidents : Select Incident	Alarm Check	Select the incident to record
2.1	Incident Details : Additional Details	alarm falsely set off	Please provide any additional details
3.1	Incident Image : Image Capture		Take a photograph of the incident

Incidents can be easily downloaded in PDF format and if the Customer has been given a Customer portal logon, they can view Incidents as they happen.

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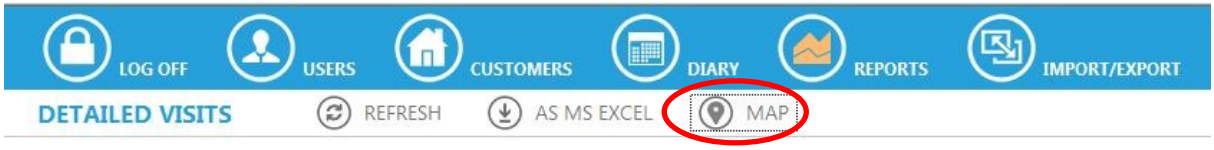
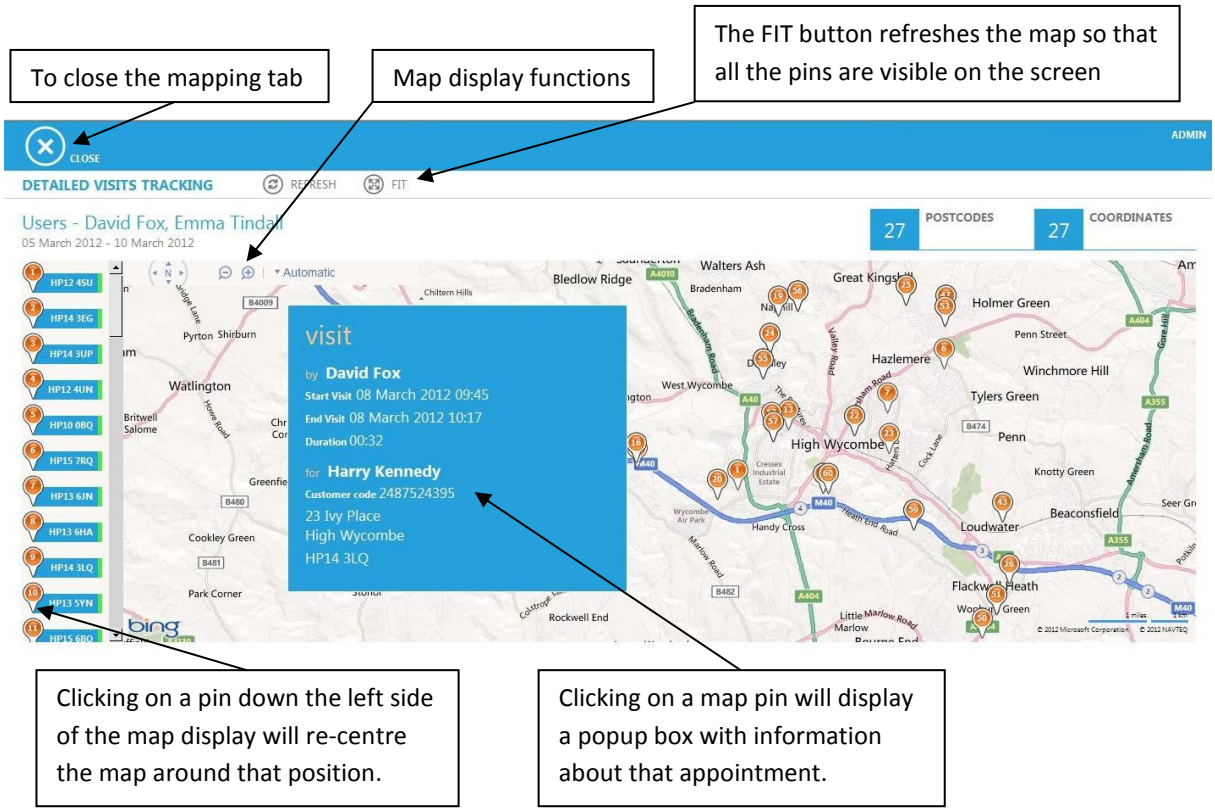
7.2.4 Mapping Detailed Visit Reports

Location data for visits in either of the Detailed Visit Reports can be viewed on a map by pressing the MAP button in the report screen. This opens a new internet browser tab displaying the reported visits for which there is Postcode data.



A Visit will not be displayed if there is no Postcode information associated with the Customer.


To close the mapping tab
Map display functions
The FIT button refreshes the map so that all the pins are visible on the screen
CLOSE
ADMIN
DETAILED VISITS TRACKING
REFRESH
FIT
Users - David Fox, Emma Tindall
05 March 2012 - 10 March 2012
27
POSTCODES
27
COORDINATES
visit
by David Fox
Start Visit 08 March 2012 09:45
End Visit 08 March 2012 10:17
Duration 00:32
for Harry Kennedy
Customer code 2487524395
23 Ivy Place
High Wycombe
HP14 3LQ
Clicking on a pin down the left side of the map display will re-centre the map around that position.
Clicking on a map pin will display a popup box with information about that appointment.

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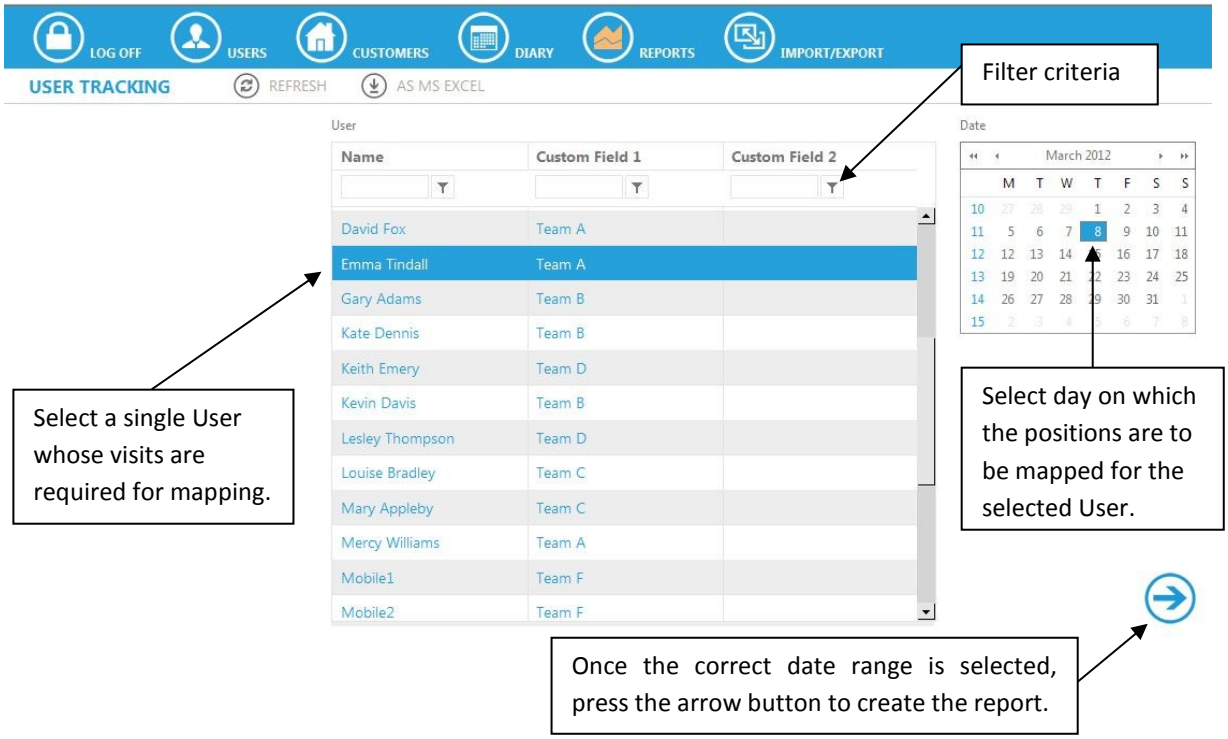
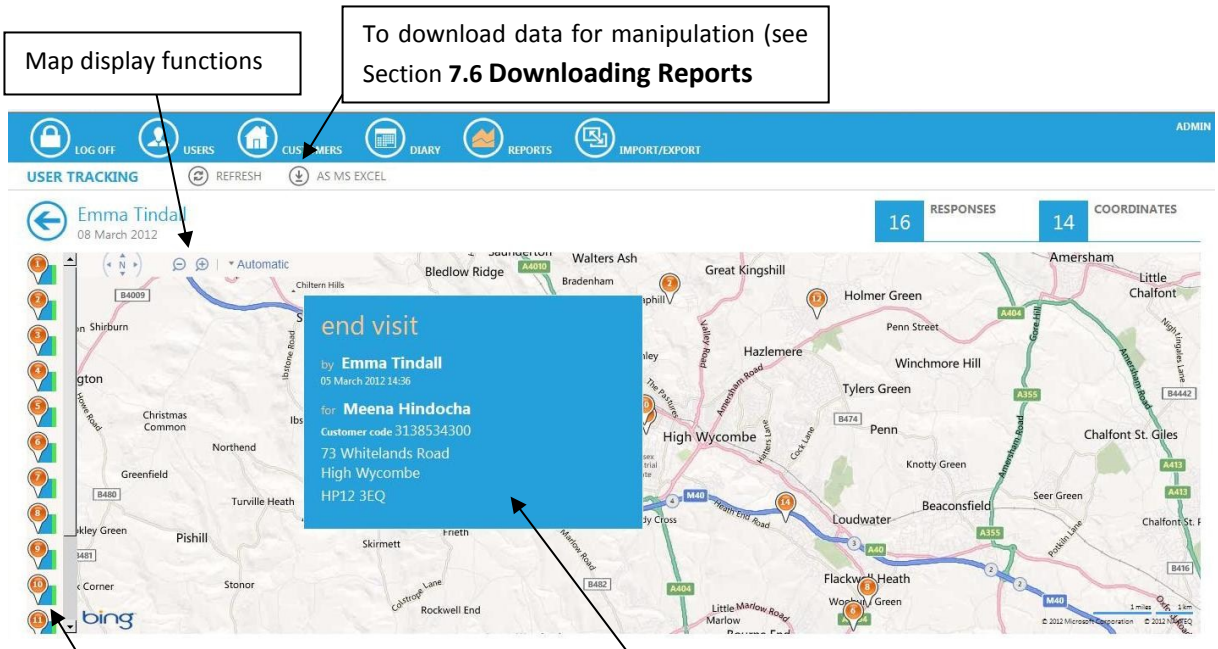
7.3 User Tracking

This tool provides a visualisation of where Users have been, by displaying pins on a map. Each time a Shift or Visit is started or ended, the mobile device captures the GPS coordinate of the device, if a GPS signal is available.





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If the cursor is moved off the popup box it will be removed from the screen in a few seconds. To keep it on the screen, keep the cursor within the box.

The map report gives information on the number of responses (the start or end of a Shift or Visit) and the number of coordinates on the map. If the 2 numbers are not the same, it is because GPS coordinates have been unable to be recorded for some of the responses.

For Visits to Customers, the GPS coordinate for the Start visit should be the same as for the End visit, therefore for a visit there will be 2 pins, 1 on top of the other.

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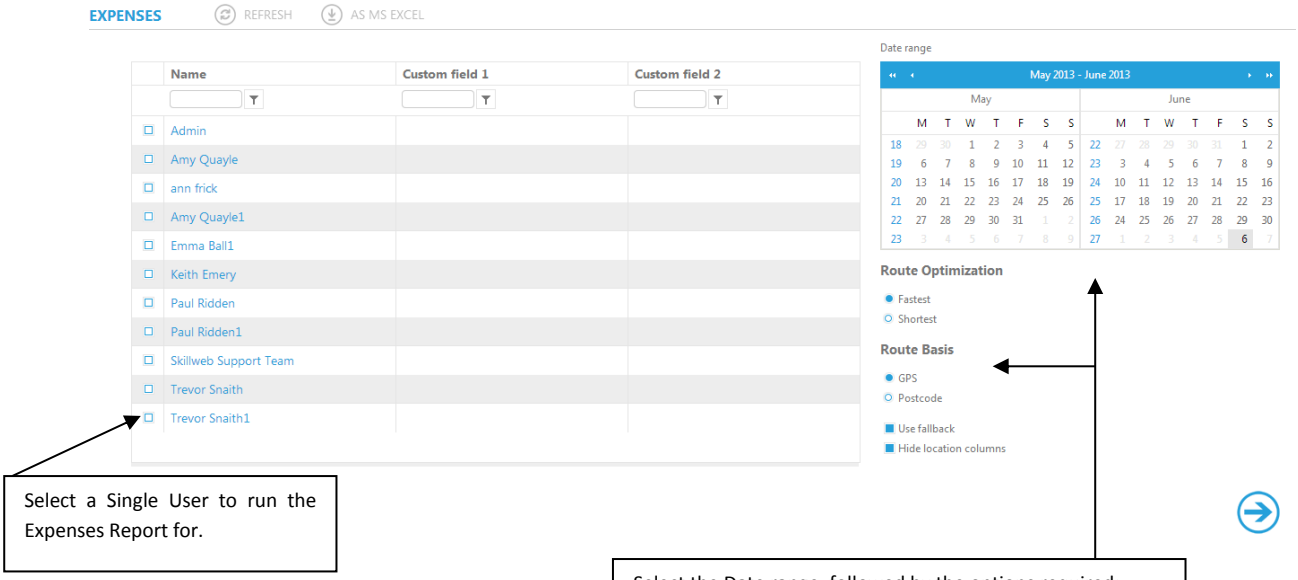
7.4 Expenses Report

The Expenses Report is used to Calculate and compare mileages from Users visits against expected mileage from an internet based mapping company, this provides the Administrator with the ability to cross reference mileage claims and to determine if a user has been exceeding the given speed limits.



Select a Single User to run the Expenses Report for.

Select the Date range, followed by the options required:

Fastest – the Fastest route available

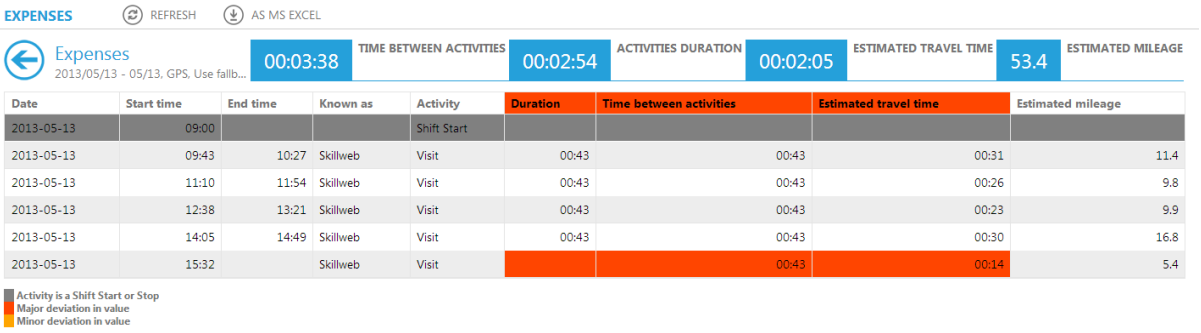
Shortest – The shortest route but not necessarily the Fastest.

GPS – Use the GPS locations captured

Postcode – Use the postcodes for the Customers

Use Fallback – Use the best data available i.e. if no GPS use Postcode.

The Expenses Report displays information in the following format:



Date	Start time	End time	Known as	Activity	Duration	Time between activities	Estimated travel time	Estimated mileage
2013-05-13	09:00			Shift Start				
2013-05-13	09:43	10:27	Skillweb	Visit	00:43	00:43	00:31	11.4
2013-05-13	11:10	11:54	Skillweb	Visit	00:43	00:43	00:26	9.8
2013-05-13	12:38	13:21	Skillweb	Visit	00:43	00:43	00:23	9.9
2013-05-13	14:05	14:49	Skillweb	Visit	00:43	00:43	00:30	16.8
2013-05-13	15:32		Skillweb	Visit		00:43	00:14	5.4

Any discrepancies between the mapping Estimated information and the users actual information is highlighted and displayed on the report.

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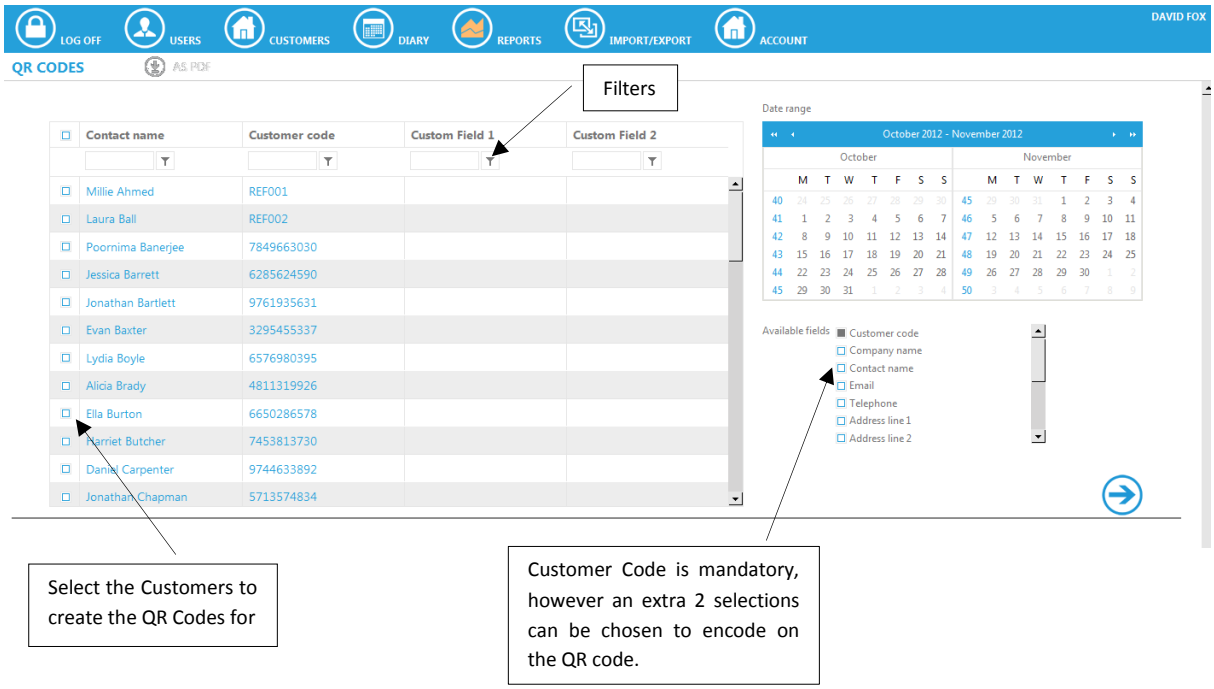
7.5 QR CODES

This feature provides the user with the ability to create QR codes from the Customer Information entered.



The Date Range Calendar allows a User to select Customers that have only be created during a specific time period, leaving the calendar blank will display all Customers created.

After entering the required information, pressing submit will generate the QR barcodes and show the information encoded alongside:

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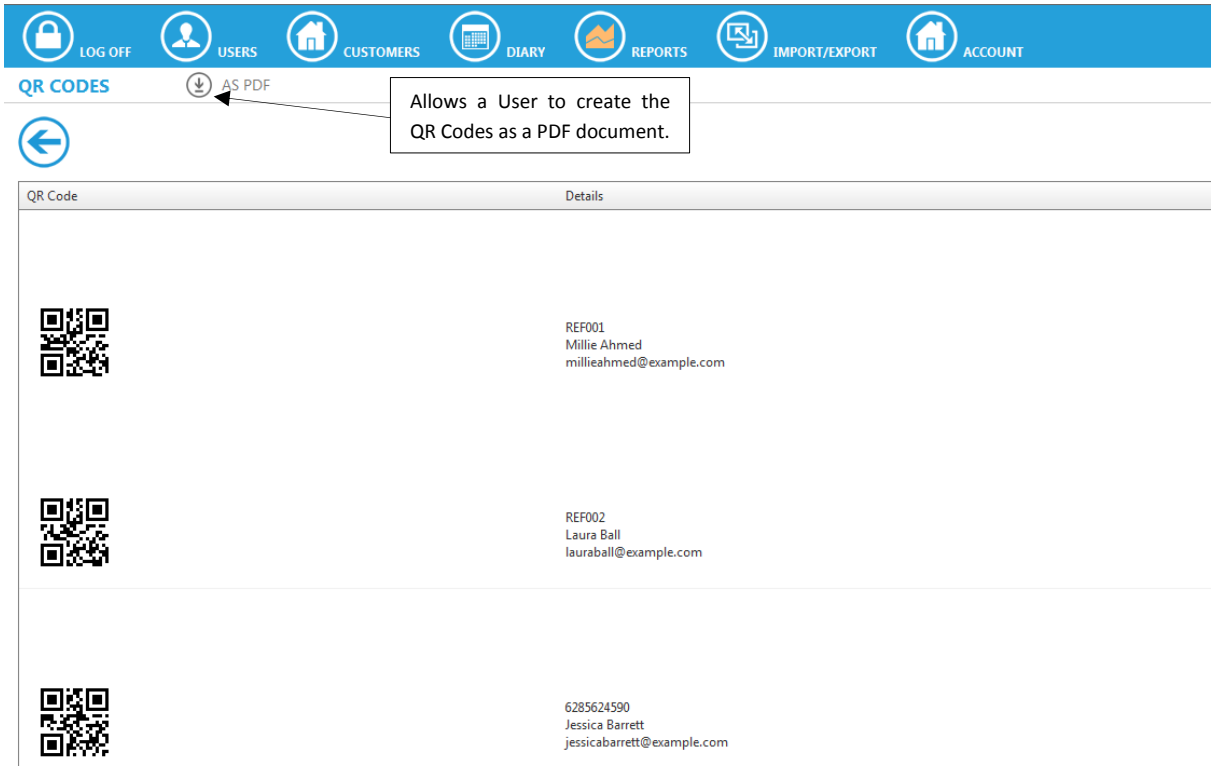

After generating the QR Codes, the user has the option to create a PDF document of the Code(s) for printing / Redistribution purposes.

7.6 Downloading Reports

All reports can be downloaded into Microsoft Excel for manipulation, by pressing the Download AS MS EXCEL button in the Command bar. The file can be opened or saved to a specified location.

For the User Tracking Report it is only the Latitude/Longitude of the points on the map that are downloaded.

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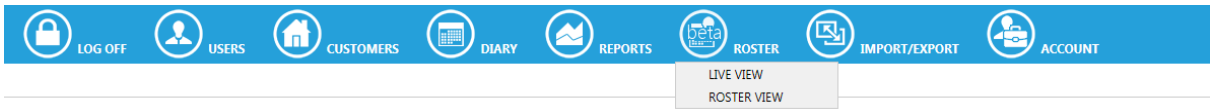
8 Roster and Live View

The roster and Live view features offer a comprehensive scheduling and monitoring system to the SmartTask Attend product. Easily Create Roster entries for Users and Customers and monitor the completion in real time, the live view monitoring page can be detached from the main website into a new window.

8.1 Roster

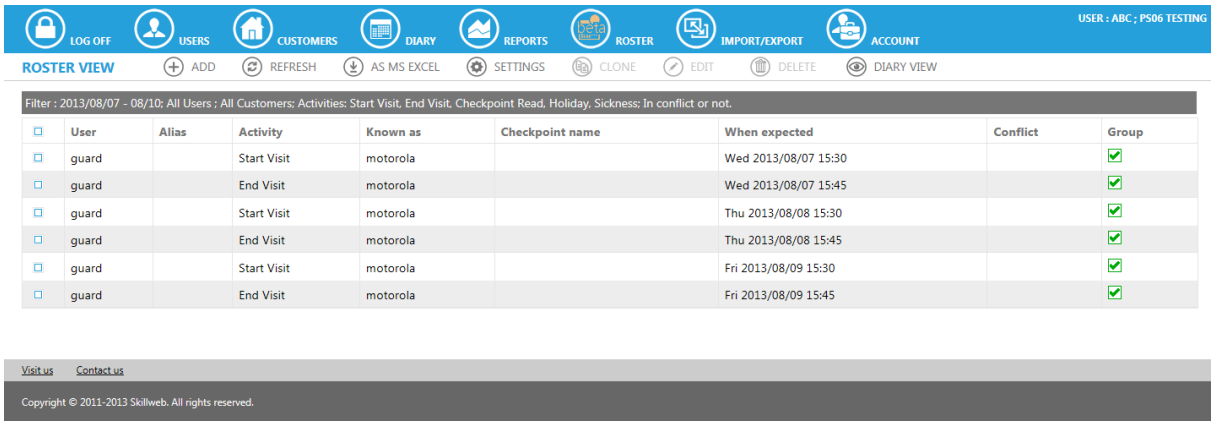
From the main Application bar on the web client, select the Roster icon.



After hovering over the icon, the Live View and Roster View selections become available.

8.1.1 Roster View

Selecting the Roster View option navigates the User to a new page displaying any current Roster entries in a grid format:


LOG OFF
USERS
CUSTOMERS
DIARY
REPORTS
ROSTER
IMPORT/EXPORT
ACCOUNT
USER : ABC ; PS06 TESTING
ROSTER VIEW
ADD
REFRESH
AS MS EXCEL
SETTINGS
CLONE
EDIT
DELETE
DIARY VIEW
Filter : 2013/08/07 - 08/10; All Users ; All Customers; Activities: Start Visit, End Visit, Checkpoint Read, Holiday, Sickness; In conflict or not.
User Alias Activity Known as Checkpoint name When expected Conflict Group
guard Start Visit motorola Wed 2013/08/07 15:30
guard End Visit motorola Wed 2013/08/07 15:45
guard Start Visit motorola Thu 2013/08/08 15:30
guard End Visit motorola Thu 2013/08/08 15:45
guard Start Visit motorola Fri 2013/08/09 15:30
guard End Visit motorola Fri 2013/08/09 15:45
Visit us
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Below the main application bar is a command bar relating to the activities that can be completed from the Roster view page:

*note – at the current time, the command bar only has the full controls when viewing in the default grid view.

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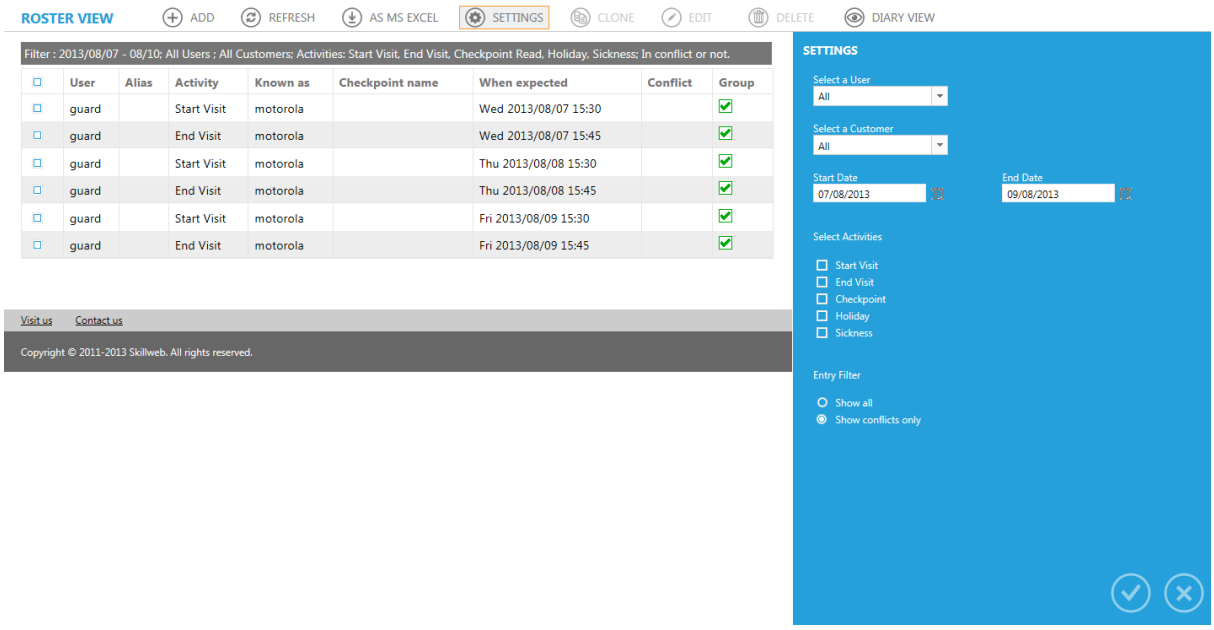
8.1.2 Settings

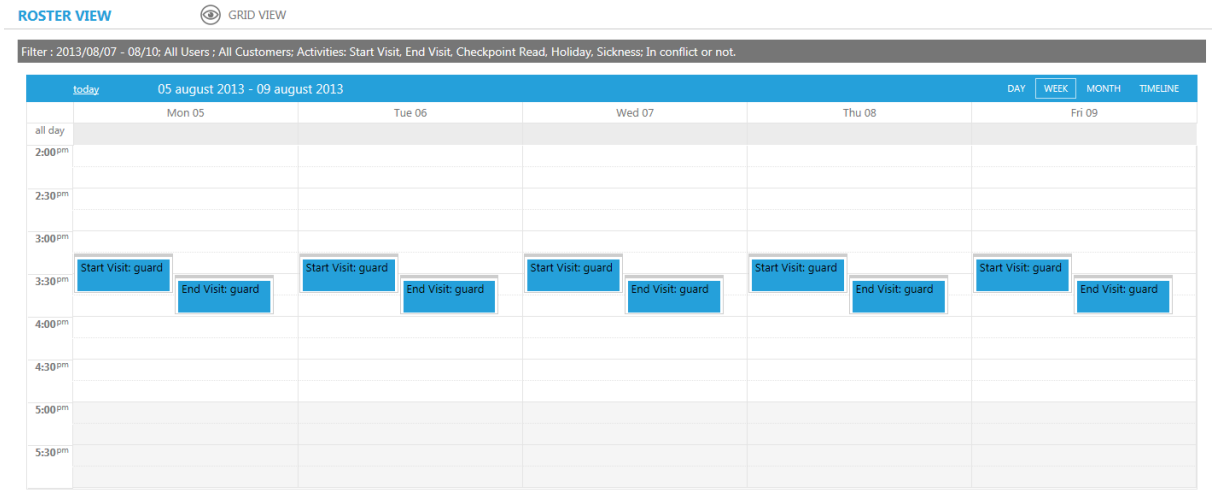
From the Command bar, selecting the settings option opens up a control panel from the left of the screen, this allows the user to select the data they wish to view:



From within the settings pane, the user can specify to show any roster entries that have been created for the User/Customer and dates chosen. Further options allow the data to be tailored depending on the specific information required.

8.1.3 Diary View

The Roster View can be changed from the default Grid view to a Diary view by simply selecting the Diary View icon from the Command Bar:



Hovering over an entry will show tooltip information relating to the type of activity, the Customer the activity is attributed to and any extra information that has been applied for the entry at the time of creation.

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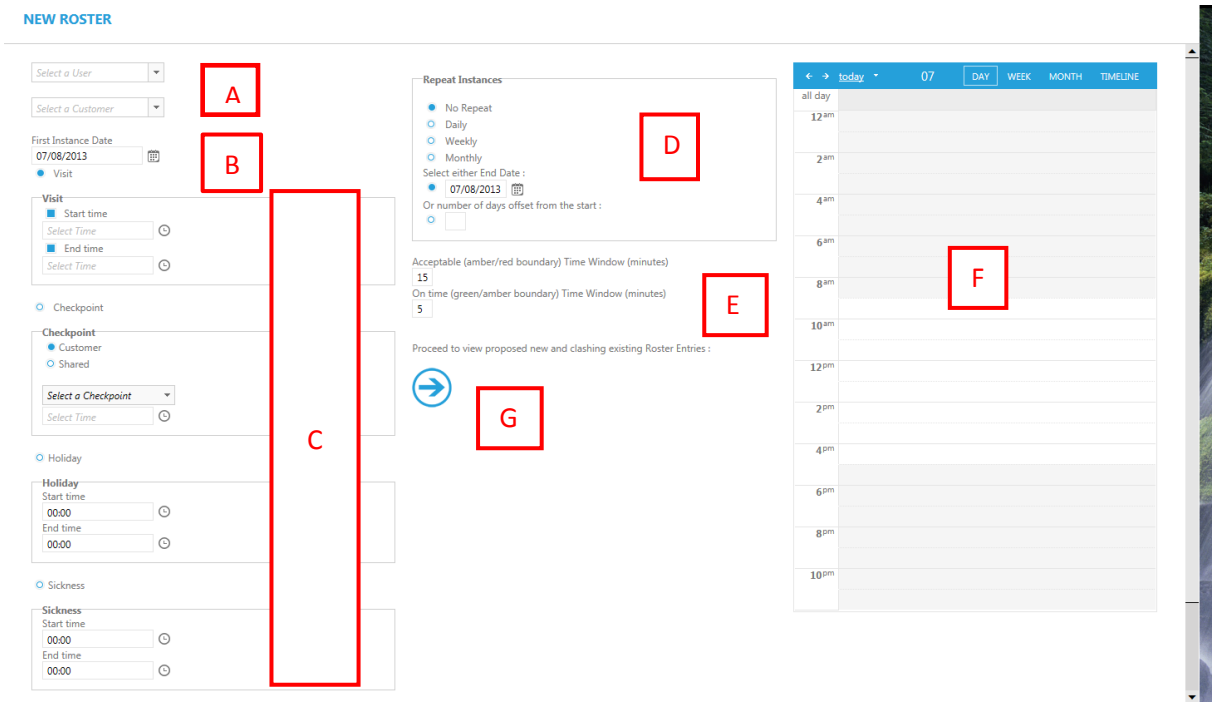
The Diary can be changed to view Day/Week/Month and Timeline views.

Selecting the Grid View from the command bar changes the display form the Diary View back to the Grid View so that new Roster entries can be added or editing/cloning or deleting can be completed.

8.1.4 Roster – Add

To add a new roster entry, select the "Add" option from the Roster Grid Command Bar:

A new browser window will open:



The Add Roster page is broken down into the following sections:

A). Provides drop down selection boxes for both choosing a User and a Customer, the records are taken from the Account so will only show available Customers/Users relevant to your account.

B). The initial date of the Roster entry

C). The Activity that the Roster entry is being created for; checkboxes can be selected for choosing the particular activity:

- Visit – Comprises of a start and end time, these can be added singularly or both at the same time, by choosing to unflag the checkboxes where required. Individual time controls for both the Start and End times are present.

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- Checkpoint – selecting the checkpoint option allows Roster entries to be created for either a Customer or an Account checkpoint, drop down selections auto update depending on the option chosen.

- Holiday – Allows holidays to be Rostered, the time controls allow for half days, full days etc.

- Sickness – Allows Sickness entries to be created.

D). Repeat Instances – Provides the ability to create roster entries and repeat these over multiple days: Daily/Weekly/Monthly or custom dates up to a maximum of 90 days in the future.

E). Time windows – When creating Roster Entries, time windows are automatically applied to the Roster entry, these time windows affect the behaviour of Roster entries when they are shown on the Live View page:

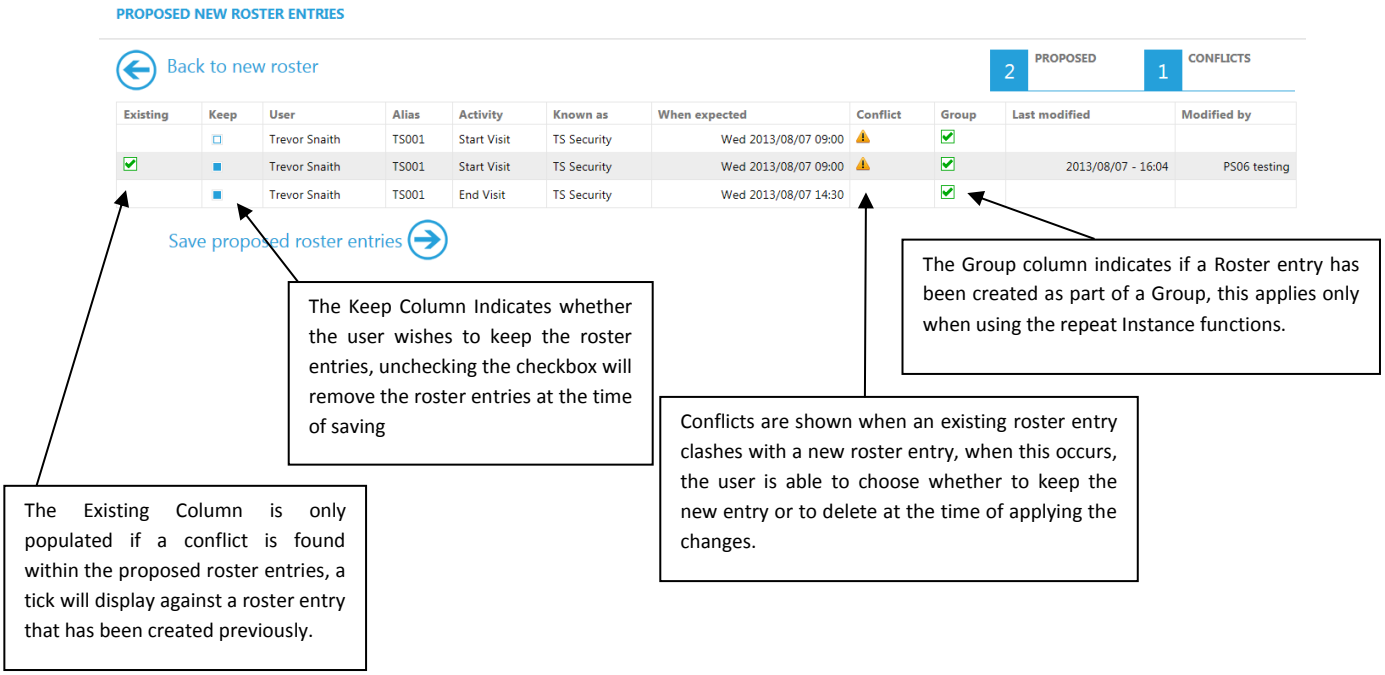
On-Time window – Roster entries that are completed within the On-Time window will change to Green with a tick denoting completion on time (Default time period is 5 minutes either side of the actual time the roster entry has been created for)

Acceptable Time Window – When a Roster entry is completed outside of the On-Time window, but is within the Acceptable time window, the Roster entry on the Live View page will turn Amber (Default time window 15 minutes either side of the actual roster entry time).

Late – When a Roster entry has not been completed within the On-Time or Acceptable windows, the Live view page will display these as Red (late).

F). A Calendar automatically refreshes to show the available time slots for the relevant User/Customer, this helps to alleviate any conflicts with existing roster entries.

G). After creating the Roster entry, selecting the Submit arrow will automatically open a proposed New Roster Entries page, showing the Roster entries you have created and if any conflicts exist that require action.


PROPOSED NEW ROSTER ENTRIES
Back to new roster
2 PROPOSED
1 CONFLICTS
Existing
Keep
User
Alias
Activity
Known as
When expected
Conflict
Group
Last modified
Modified by
Trevor Snaith TS001 Start Visit TS Security Wed 2013/08/07 09:00
Trevor Snaith TS001 Start Visit TS Security Wed 2013/08/07 09:00 2013/08/07 - 16:04 PS06 testing
Trevor Snaith TS001 End Visit TS Security Wed 2013/08/07 14:30
Save proposed roster entries
The Existing Column is only populated if a conflict is found within the proposed roster entries, a tick will display against a roster entry that has been created previously.
The Keep Column Indicates whether the user wishes to keep the roster entries, unchecking the checkbox will remove the roster entries at the time of saving
Conflicts are shown when an existing roster entry clashes with a new roster entry, when this occurs, the user is able to choose whether to keep the new entry or to delete at the time of applying the changes.
The Group column indicates if a Roster entry has been created as part of a Group, this applies only when using the repeat Instance functions.

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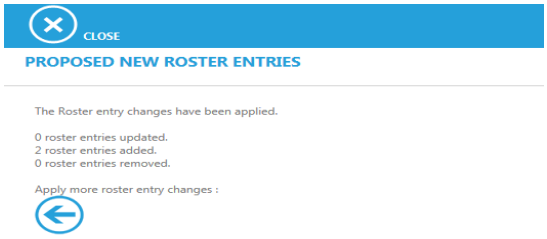
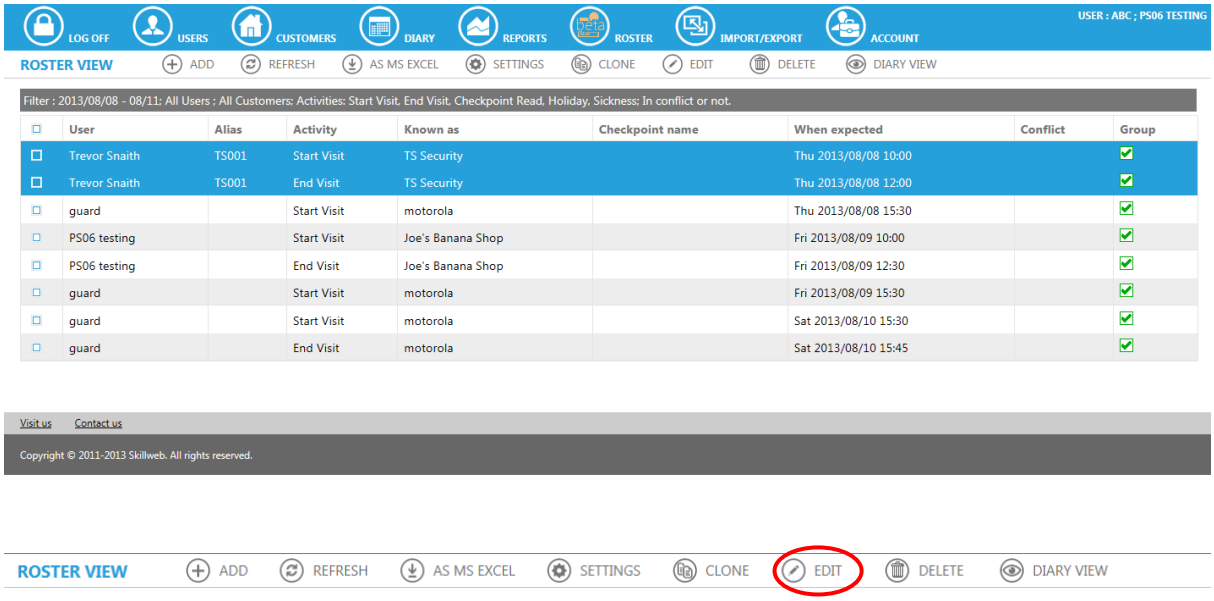
Selecting the Save Proposed Roster Entries will save the entries and prompt the user if they wish to add more entries. Select the Arrow to return to the Add Roster page, or select the close icon to return to the main browser window.


CLOSE
PROPOSED NEW ROSTER ENTRIES
The Roster entry changes have been applied.
0 roster entries updated.
2 roster entries added.
0 roster entries removed.
Apply more roster entry changes :

8.1.5 Roster – Edit

Editing Roster entries is completed from the Roster Grid view (default view when selecting Roster View), to Edit an existing Roster entry or entries, If multiple rows are selected at the point of entering the Edit screen, then all rows will be updated with the new changes.

Select the relevant row(s) on the grid and then press the Edit icon from the command bar:


LOG OFF
USERS
CUSTOMERS
DIARY
REPORTS
ROSTER
IMPORT/EXPORT
ACCOUNT
USER : ABC ; PS06 TESTING
ROSTER VIEW
ADD
REFRESH
AS MS EXCEL
SETTINGS
CLONE
EDIT
DELETE
DIARY VIEW
Filter : 2013/08/08 - 08/11: All Users ; All Customers; Activities: Start Visit, End Visit, Checkpoint Read, Holiday, Sickness; In conflict or not.
User | Alias | Activity | Known as | Checkpoint name | When expected | Conflict | Group
Trevor Snaith | TS001 | Start Visit | TS Security | | Thu 2013/08/08 10:00
Trevor Snaith | TS001 | End Visit | TS Security | | Thu 2013/08/08 12:00
guard | | Start Visit | motorola | | Thu 2013/08/08 15:30
PS06 testing | | Start Visit | Joe's Banana Shop | | Fri 2013/08/09 10:00
PS06 testing | | End Visit | Joe's Banana Shop | | Fri 2013/08/09 12:30
guard | | Start Visit | motorola | | Fri 2013/08/09 15:30
guard | | Start Visit | motorola | | Sat 2013/08/10 15:30
guard | | End Visit | motorola | | Sat 2013/08/10 15:45
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After selecting the Edit icon, the user will be navigated to the Edit roster page:

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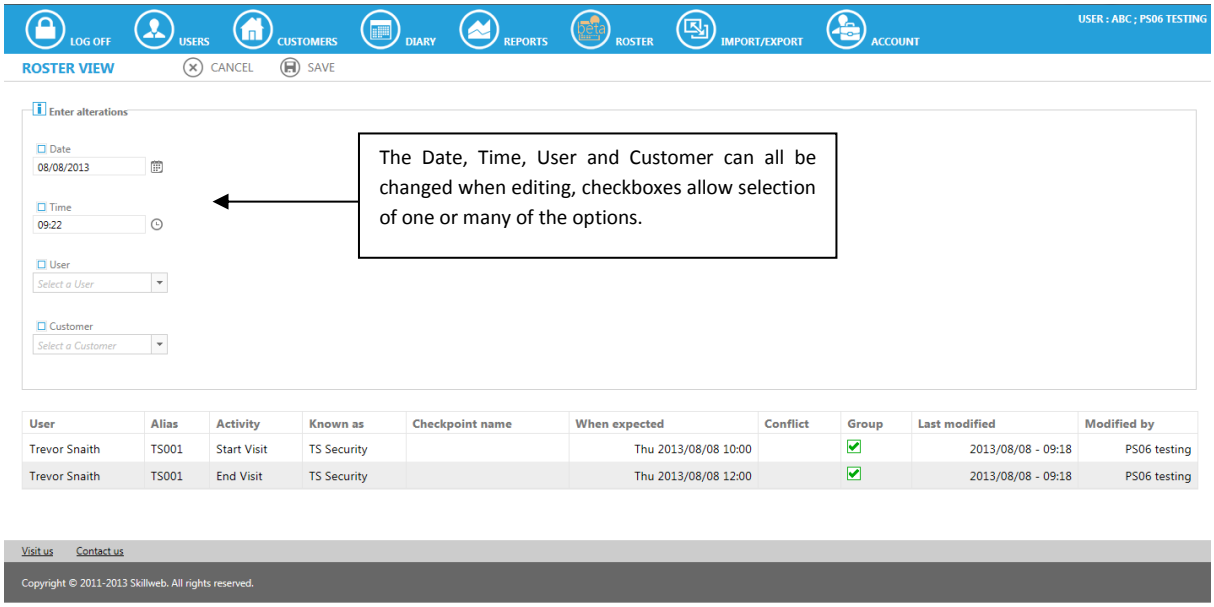

After making any changes required, pressing the Save Icon will navigate the user to the proposed alterations page. Pressing the Cancel icon will return to the Roster Grid View.

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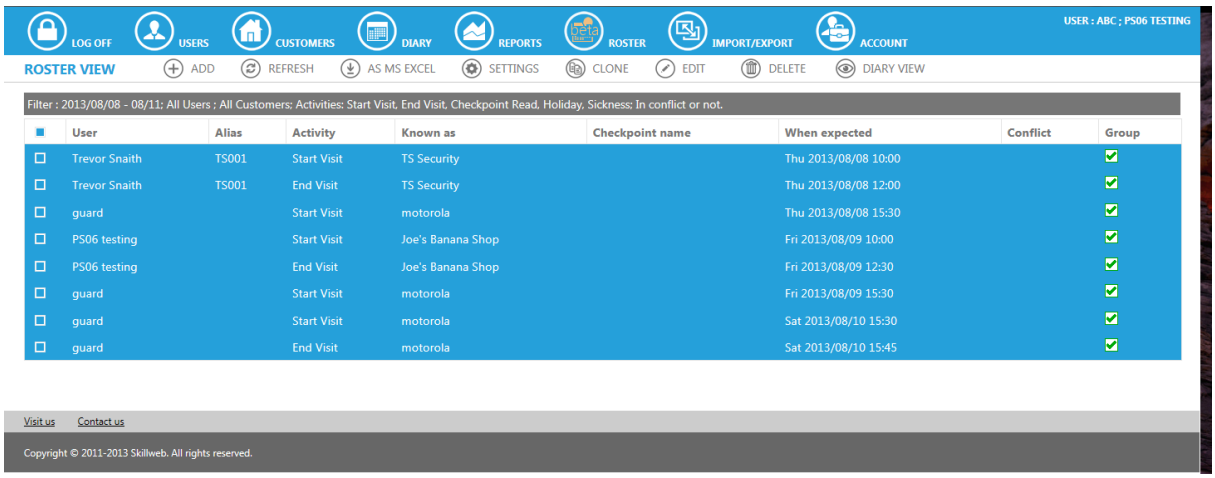
8.1.6 Roster – Clone

The Clone feature for Rostering allows multiple Roster entries to be selected and then copied to a new date in the future. If roster entries are chosen from a range of dates, these can be cloned for the same pattern of days starting from the new date of the cloned entries.

The Clone feature is accessed by selecting the Roster entries required from the Roster grid view:


LOG OFF
USERS
CUSTOMERS
DIARY
REPORTS
ROSTER
IMPORT/EXPORT
ACCOUNT
USER : ABC ; PS06 TESTING
ROSTER VIEW
ADD
REFRESH
AS MS EXCEL
SETTINGS
CLONE
EDIT
DELETE
DIARY VIEW
Filter : 2013/08/08 - 08/11; All Users ; All Customers; Activities: Start Visit, End Visit, Checkpoint Read, Holiday, Sickness; In conflict or not.
User | Alias | Activity | Known as | Checkpoint name | When expected | Conflict | Group
Trevor Snaith | TS001 | Start Visit | TS Security | | Thu 2013/08/08 10:00
Trevor Snaith | TS001 | End Visit | TS Security | | Thu 2013/08/08 12:00
guard | | Start Visit | motorola | | Thu 2013/08/08 15:30
PS06 testing | | Start Visit | Joe's Banana Shop | | Fri 2013/08/09 10:00
PS06 testing | | End Visit | Joe's Banana Shop | | Fri 2013/08/09 12:30
guard | | Start Visit | motorola | | Fri 2013/08/09 15:30
guard | | Start Visit | motorola | | Sat 2013/08/10 15:30
guard | | End Visit | motorola | | Sat 2013/08/10 15:45
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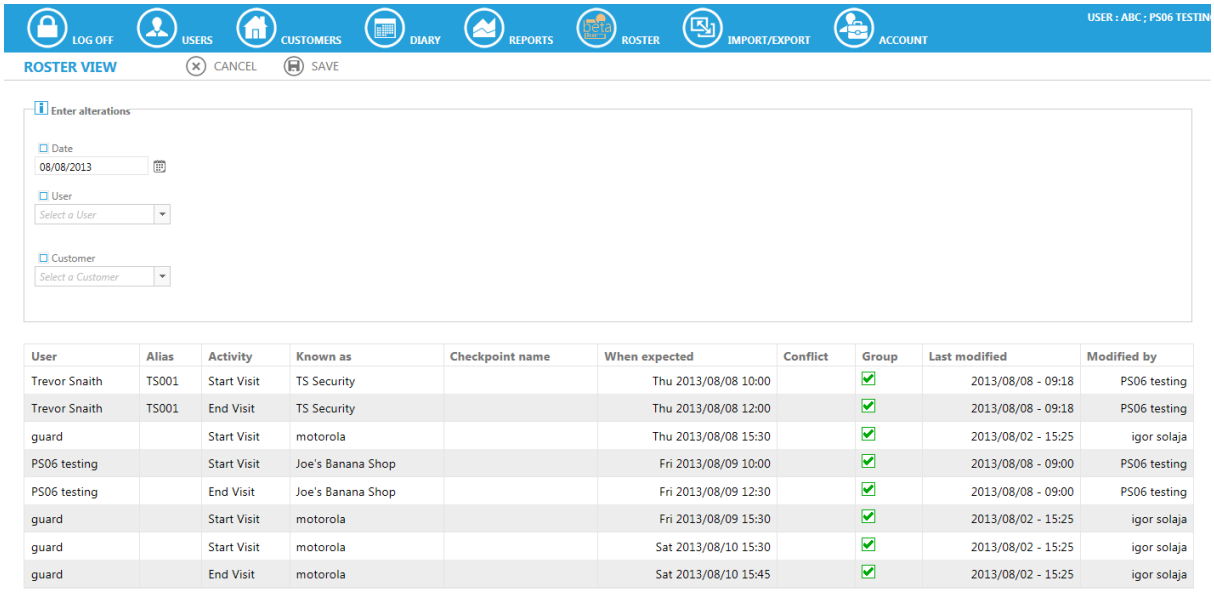
After selecting the required rows, chose the Clone option from the command bar:


LOG OFF
USERS
CUSTOMERS
DIARY
REPORTS
ROSTER
IMPORT/EXPORT
ACCOUNT
USER : ABC ; PS06 TESTIN
ROSTER VIEW
CANCEL
SAVE
Enter alterations
Date
08/08/2013
User
Select a User
Customer
Select a Customer
User | Alias | Activity | Known as | Checkpoint name | When expected | Conflict | Group | Last modified | Modified by
Trevor Snaith | TS001 | Start Visit | TS Security | | Thu 2013/08/08 10:00 | | | 2013/08/08 - 09:18 | PS06 testing
Trevor Snaith | TS001 | End Visit | TS Security | | Thu 2013/08/08 12:00 | | | 2013/08/08 - 09:18 | PS06 testing
guard | | Start Visit | motorola | | Thu 2013/08/08 15:30 | | | 2013/08/02 - 15:25 | igor solaja
PS06 testing | | Start Visit | Joe's Banana Shop | | Fri 2013/08/09 10:00 | | | 2013/08/08 - 09:00 | PS06 testing
PS06 testing | | End Visit | Joe's Banana Shop | | Fri 2013/08/09 12:30 | | | 2013/08/08 - 09:00 | PS06 testing
guard | | Start Visit | motorola | | Fri 2013/08/09 15:30 | | | 2013/08/02 - 15:25 | igor solaja
guard | | Start Visit | motorola | | Sat 2013/08/10 15:30 | | | 2013/08/02 - 15:25 | igor solaja
guard | | End Visit | motorola | | Sat 2013/08/10 15:45 | | | 2013/08/02 - 15:25 | igor solaja

The top left of the roster clone screen provides 3 checkbox selections, the selections allow the Date / User and Customer to be changed for the roster entries chosen and displayed in the grid below.

To make any changes, flag the checkbox(s) required, use the calendar control to select a new date, or the drop down selections to change the user/customer.

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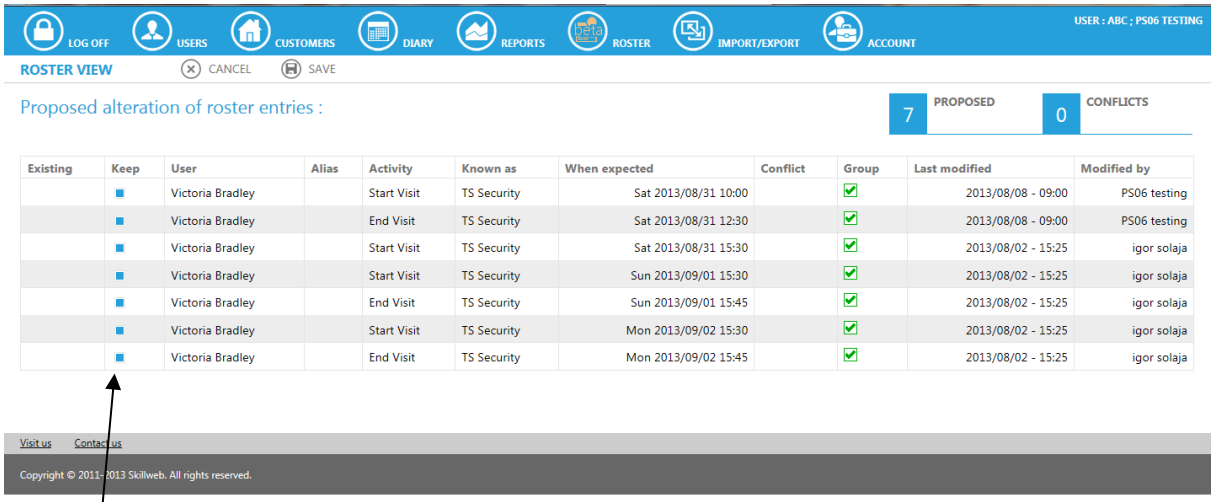
After making any changes, press the Save icon to navigate to the proposed changes, or select the cancel icon to back out of the process and return to the roster grid view.

If Save is chosen, the user is taken to the following page:



Review the displayed information and use the Keep column checkboxes to select/ de-select any changes that are not required.

After reviewing the proposed changes, select Save to apply the changes, alternatively select Cancel to return to the Roster Grid View.

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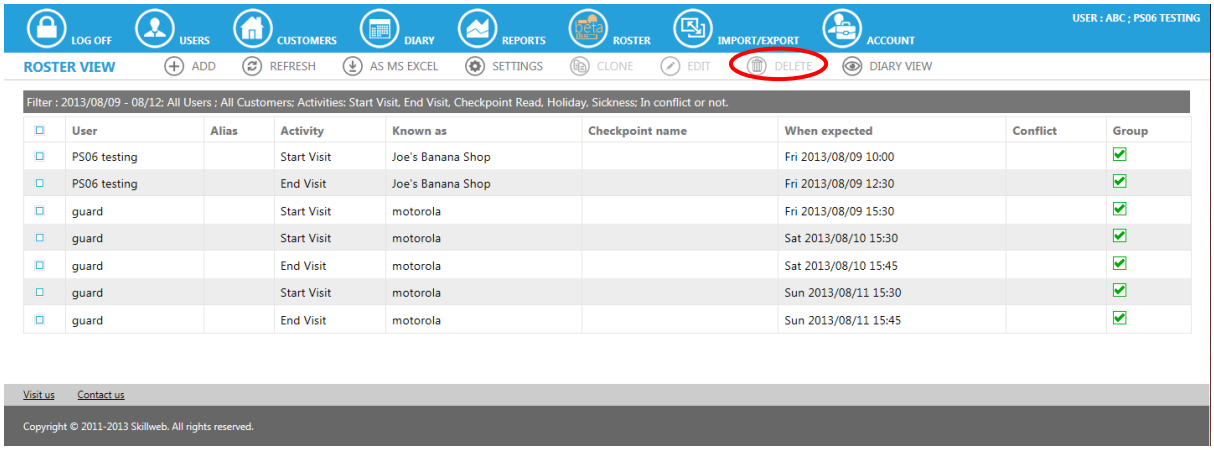
8.1.7 Roster - Delete

To Delete a Roster entry, navigate to the Roster Grid View:


LOG OFF
USERS
CUSTOMERS
DIARY
REPORTS
ROSTER
IMPORT/EXPORT
ACCOUNT
USER : ABC ; PS06 TESTING
ROSTER VIEW
ADD
REFRESH
AS MS EXCEL
SETTINGS
CLONE
EDIT
DELETE
DIARY VIEW
Filter : 2013/08/09 - 08/12; All Users ; All Customers; Activities: Start Visit, End Visit, Checkpoint Read, Holiday, Sickness; In conflict or not.
User | Alias | Activity | Known as | Checkpoint name | When expected | Conflict | Group
PS06 testing | | Start Visit | Joe's Banana Shop | | Fri 2013/08/09 10:00
PS06 testing | | End Visit | Joe's Banana Shop | | Fri 2013/08/09 12:30
guard | | Start Visit | motorola | | Fri 2013/08/09 15:30
guard | | Start Visit | motorola | | Sat 2013/08/10 15:30
guard | | End Visit | motorola | | Sat 2013/08/10 15:45
guard | | Start Visit | motorola | | Sun 2013/08/11 15:30
guard | | End Visit | motorola | | Sun 2013/08/11 15:45
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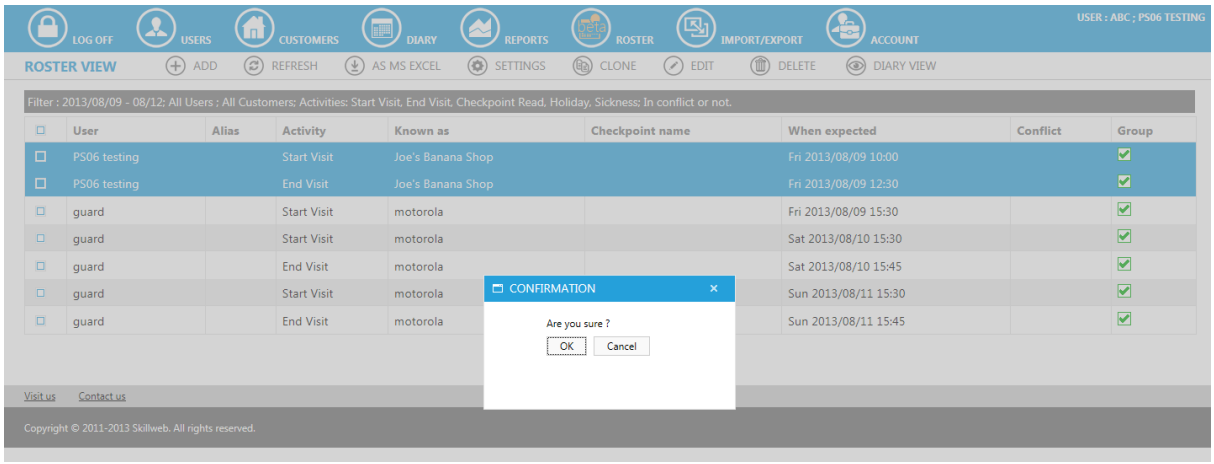
Highlight the Row(s) which are not required and then select the Delete icon from the command bar.

The Delete icon will always remain unselectable until a row is chosen, any roster entries that are in the past cannot be deleted.



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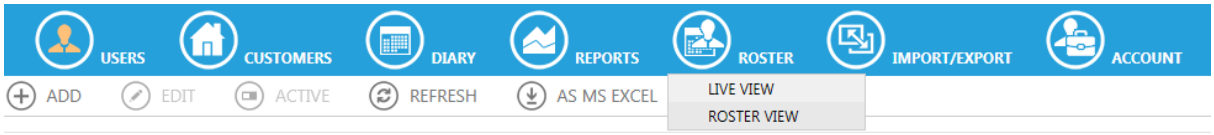
8.2 Live View

The Live View Page provides a way of monitoring roster entries for the current day, the concept of Red/Amber/Green traffic lights are applied to Roster entries depending on the current status.

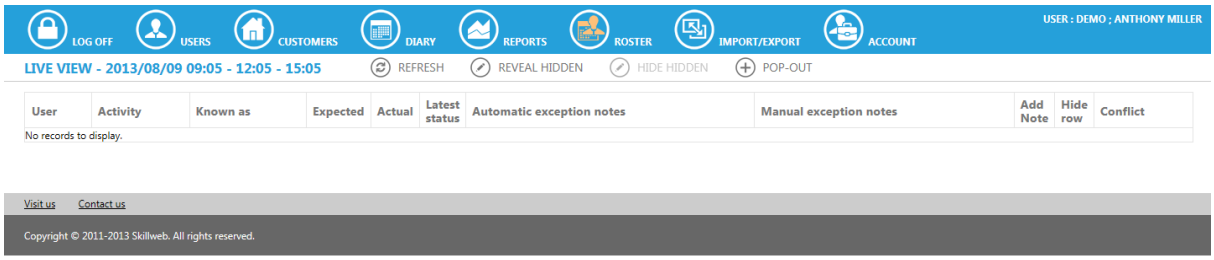
To Access the Live View page, hover over the roster icon from the main action bar:



Select Live View and the user will be navigated to the live view page.

The live view page uses a rolling time window approach, showing all roster entries upcoming or in the past, this is set by default to a 6 hour window, 3 hours in the past and 3 hours in the future of the current time.

If no Roster entries are available to view, the Live view page will display as:



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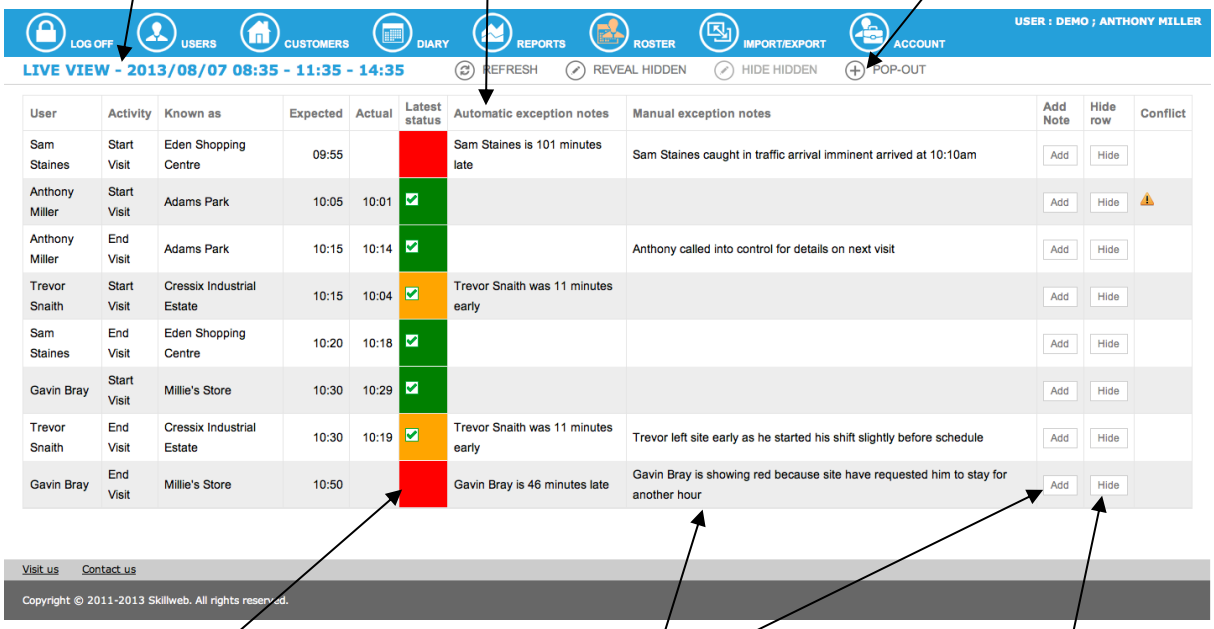
When Roster entries are present on the day, they can be monitored, notes added and emails sent out, during the timeframe that the live view page has been set for.

The Live View page utilises a rolling window approach to displaying Roster entries, the default time period is a 6 hour window – 3 hours behind and 3 hours in front of the current time.

The page automatically refreshes on a 2 minute timer.

Automatic Exception notes are applied when the system identifies a roster entry as being either early and completed, late and completed or not completed.

The Pop-Out button enables the Live view page to be opened in a new browser window and displayed on another monitor; this means work can be carried out on the web client with the live view page running.



User	Activity	Known as	Expected	Actual	Latest status	Automatic exception notes	Manual exception notes	Add Note	Hide row	Conflict
Sam Staines	Start Visit	Eden Shopping Centre	09:55			Sam Staines is 101 minutes late	Sam Staines caught in traffic arrival imminent arrived at 10:10am	Add	Hide	
Anthony Miller	Start Visit	Adams Park	10:05	10:01				Add	Hide	
Anthony Miller	End Visit	Adams Park	10:15	10:14			Anthony called into control for details on next visit	Add	Hide	
Trevor Snaith	Start Visit	Cressix Industrial Estate	10:15	10:04		Trevor Snaith was 11 minutes early		Add	Hide	
Sam Staines	End Visit	Eden Shopping Centre	10:20	10:18				Add	Hide	
Gavin Bray	Start Visit	Millie's Store	10:30	10:29				Add	Hide	
Trevor Snaith	End Visit	Cressix Industrial Estate	10:30	10:19		Trevor Snaith was 11 minutes early	Trevor left site early as he started his shift slightly before schedule	Add	Hide	
Gavin Bray	End Visit	Millie's Store	10:50			Gavin Bray is 46 minutes late	Gavin Bray is showing red because site have requested him to stay for another hour	Add	Hide	

The Latest status column displays a colour coded visual identifier to roster entries:

Green – Roster entry has successfully been completed on time

Amber – Roster Entry has been completed early or late.

Red – Roster entry is late or not completed.

The time windows set at the time of creating the roster entries affects the time between changing colours.

Manual notes can be added to the live view page at any time, when a manual note is added an email is sent across to the email addresses entered in the user notification field, the comment is added to the manual exception notes column.

Rows can be hidden from view using the Hide button, or can be unhidden using the Reveal hidden button on the command bar.

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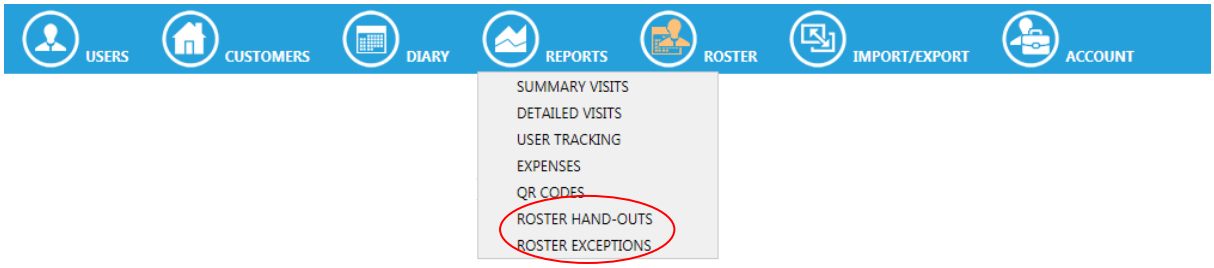
8.3 Roster Reports

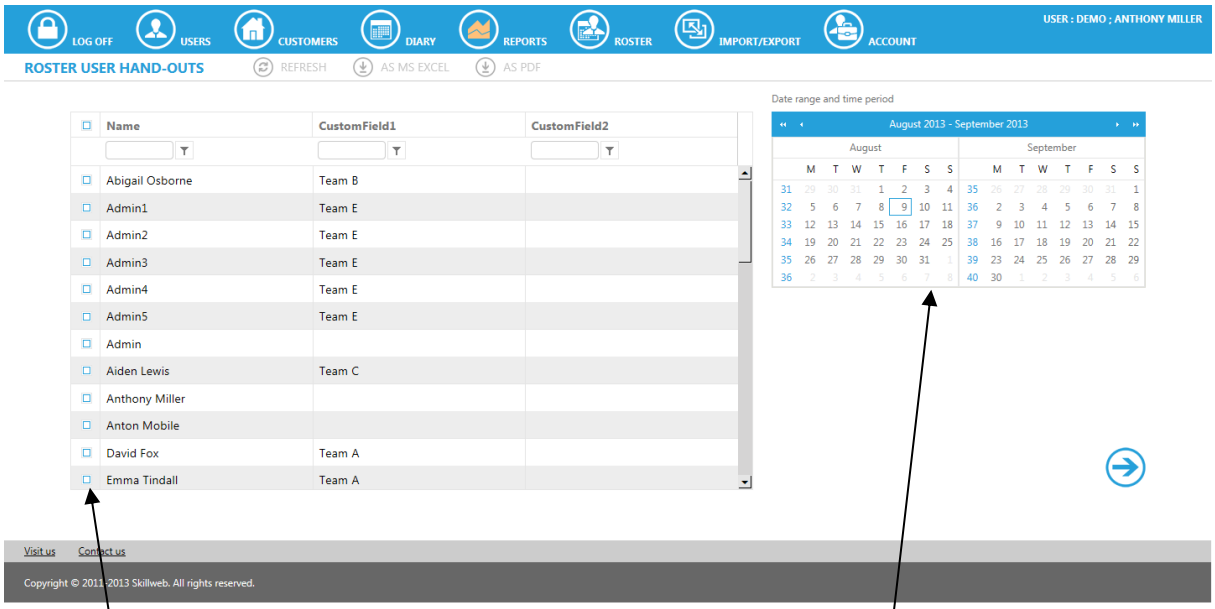
New reports have been added under the reports menu from the action bar:



8.3.1 Roster Hand – Outs

The Roster Hand-Outs report is used to create hard copies of the Roster entries for Users; these can then be generated and printed or emailed across to the relevant users so they have a clear view of the Rostered events for the date range selected.

Choose the Roster Hand-Outs selection from the Action bar:



Select up to 8 Users at a time by flagging the checkbox(s) next to the username.

Choose the date range that the report should be generated for using the calendar controls supplied.

Press the Submit icon to generate the report.

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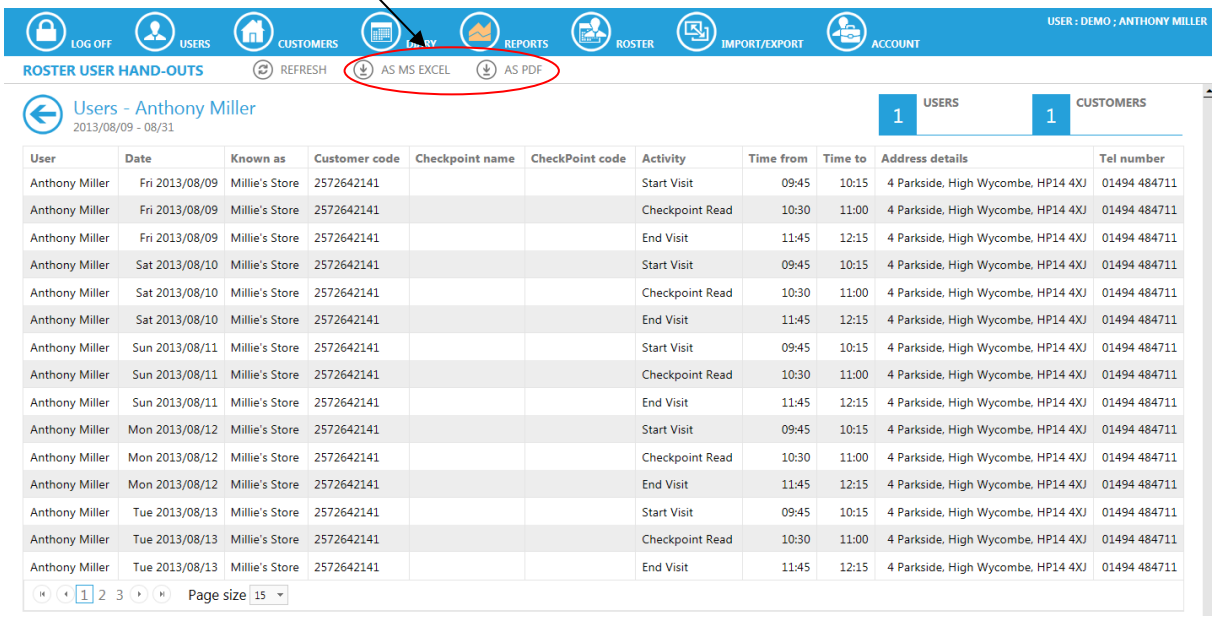
Once Generated, the report can be downloaded in either MS Excel or PDF format.



User	Date	Known as	Customer code	Checkpoint name	CheckPoint code	Activity	Time from	Time to	Address details	Tel number
Anthony Miller	Fri 2013/08/09	Millie's Store	2572642141			Start Visit	09:45	10:15	4 Parkside, High Wycombe, HP14 4XJ	01494 484711
Anthony Miller	Fri 2013/08/09	Millie's Store	2572642141			Checkpoint Read	10:30	11:00	4 Parkside, High Wycombe, HP14 4XJ	01494 484711
Anthony Miller	Fri 2013/08/09	Millie's Store	2572642141			End Visit	11:45	12:15	4 Parkside, High Wycombe, HP14 4XJ	01494 484711
Anthony Miller	Sat 2013/08/10	Millie's Store	2572642141			Start Visit	09:45	10:15	4 Parkside, High Wycombe, HP14 4XJ	01494 484711
Anthony Miller	Sat 2013/08/10	Millie's Store	2572642141			Checkpoint Read	10:30	11:00	4 Parkside, High Wycombe, HP14 4XJ	01494 484711
Anthony Miller	Sat 2013/08/10	Millie's Store	2572642141			End Visit	11:45	12:15	4 Parkside, High Wycombe, HP14 4XJ	01494 484711
Anthony Miller	Sun 2013/08/11	Millie's Store	2572642141			Start Visit	09:45	10:15	4 Parkside, High Wycombe, HP14 4XJ	01494 484711
Anthony Miller	Sun 2013/08/11	Millie's Store	2572642141			Checkpoint Read	10:30	11:00	4 Parkside, High Wycombe, HP14 4XJ	01494 484711
Anthony Miller	Sun 2013/08/11	Millie's Store	2572642141			End Visit	11:45	12:15	4 Parkside, High Wycombe, HP14 4XJ	01494 484711
Anthony Miller	Mon 2013/08/12	Millie's Store	2572642141			Start Visit	09:45	10:15	4 Parkside, High Wycombe, HP14 4XJ	01494 484711
Anthony Miller	Mon 2013/08/12	Millie's Store	2572642141			Checkpoint Read	10:30	11:00	4 Parkside, High Wycombe, HP14 4XJ	01494 484711
Anthony Miller	Mon 2013/08/12	Millie's Store	2572642141			End Visit	11:45	12:15	4 Parkside, High Wycombe, HP14 4XJ	01494 484711
Anthony Miller	Tue 2013/08/13	Millie's Store	2572642141			Start Visit	09:45	10:15	4 Parkside, High Wycombe, HP14 4XJ	01494 484711
Anthony Miller	Tue 2013/08/13	Millie's Store	2572642141			Checkpoint Read	10:30	11:00	4 Parkside, High Wycombe, HP14 4XJ	01494 484711
Anthony Miller	Tue 2013/08/13	Millie's Store	2572642141			End Visit	11:45	12:15	4 Parkside, High Wycombe, HP14 4XJ	01494 484711

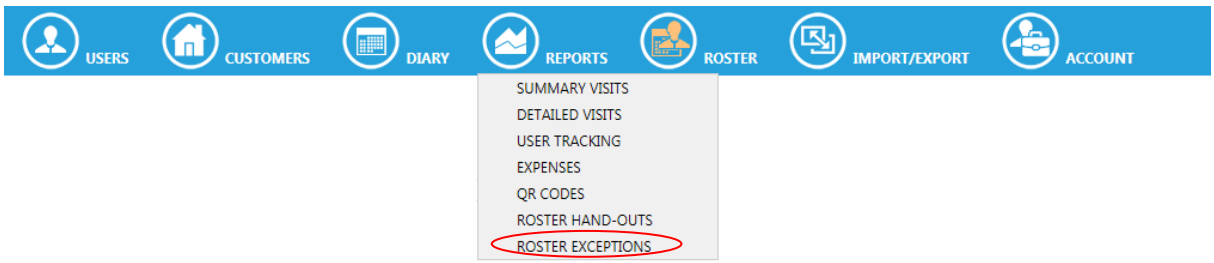
1 2 3 Page size 15

The Roster Hand-Out report lists each user in alphabetical order, with all information for users in chronological order.

8.3.2 Roster – Exceptions Report

The Roster Exceptions Report displays all manual notes that have been created from the Live View page; this provides an Audit trail for resolution of issues and performance analysis.

The report is found under the main Report icon at the bottom of the list when hovered over:



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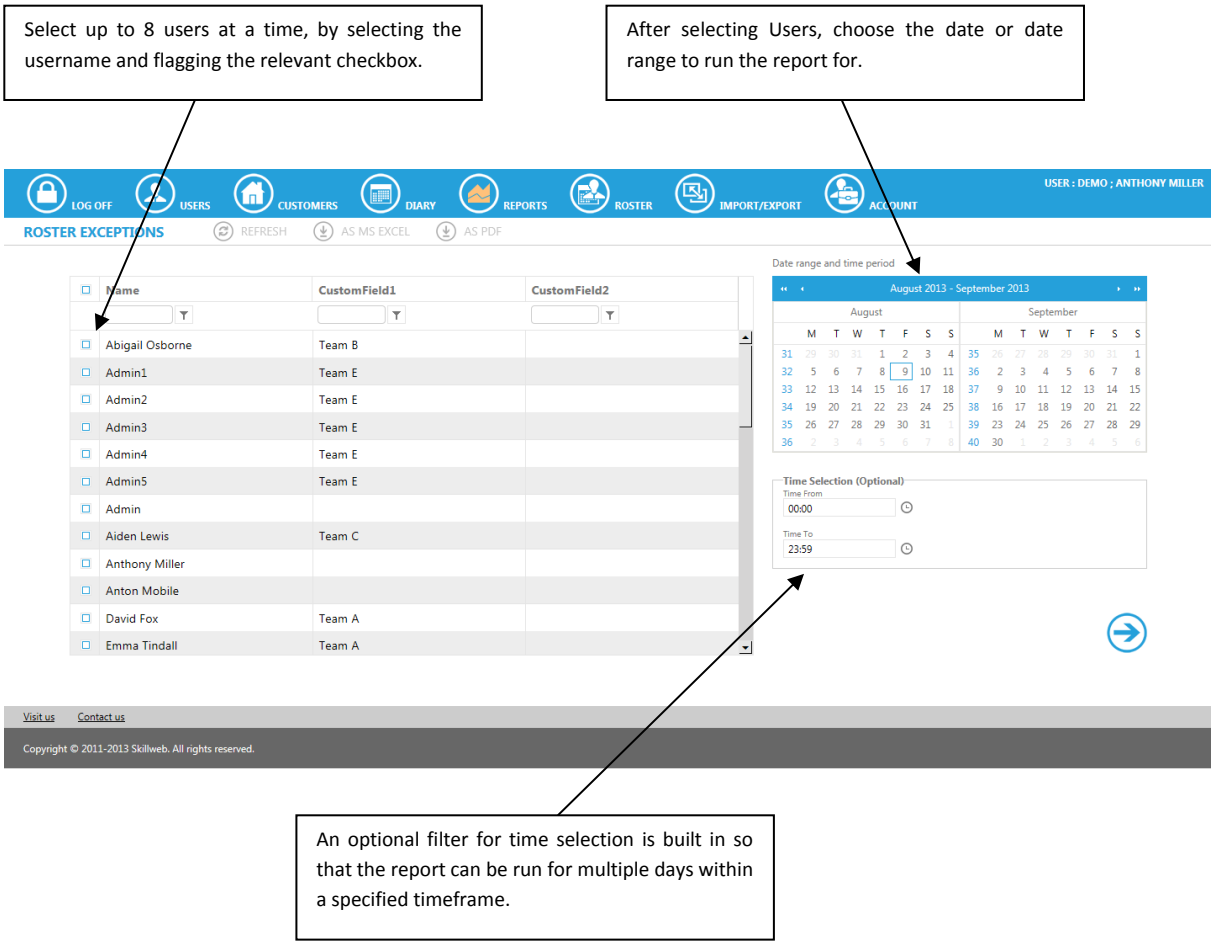
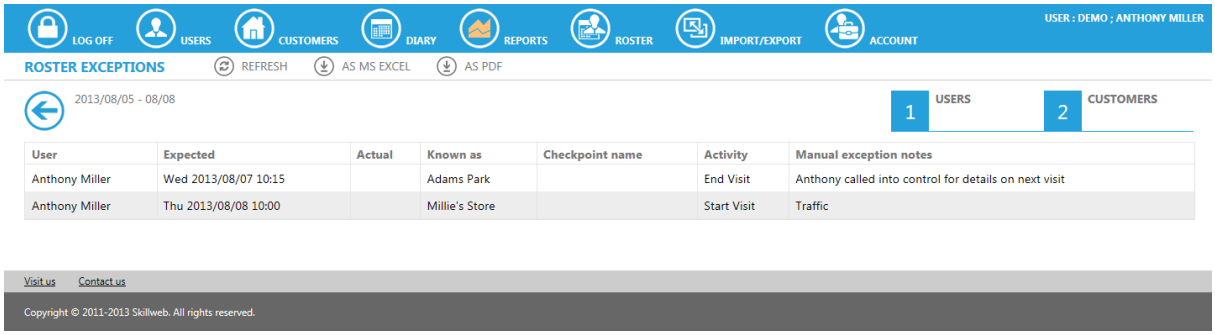
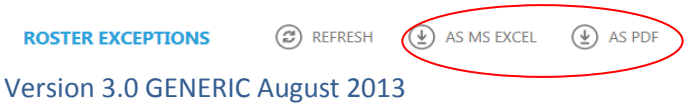
Once selected, the following page will be shown:



Select the Submit icon to generate the report



Once the report has been generated, the information can be downloaded into MS Excel or PDF format using the options from the Command bar:



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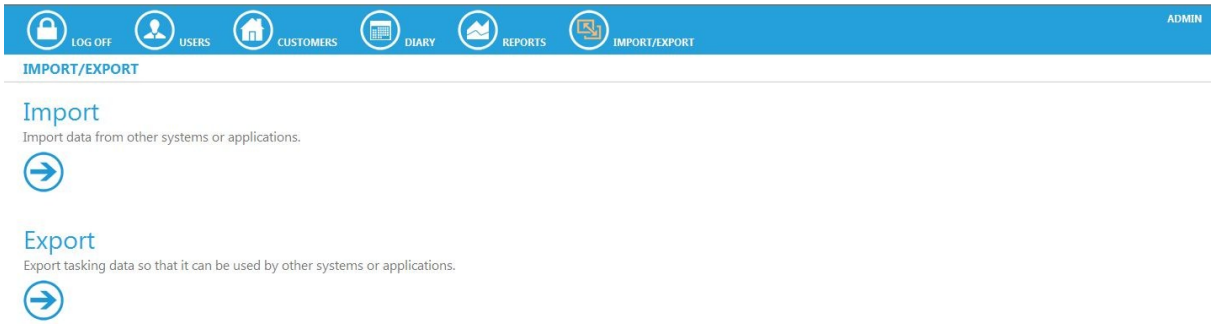
9 Import/Export

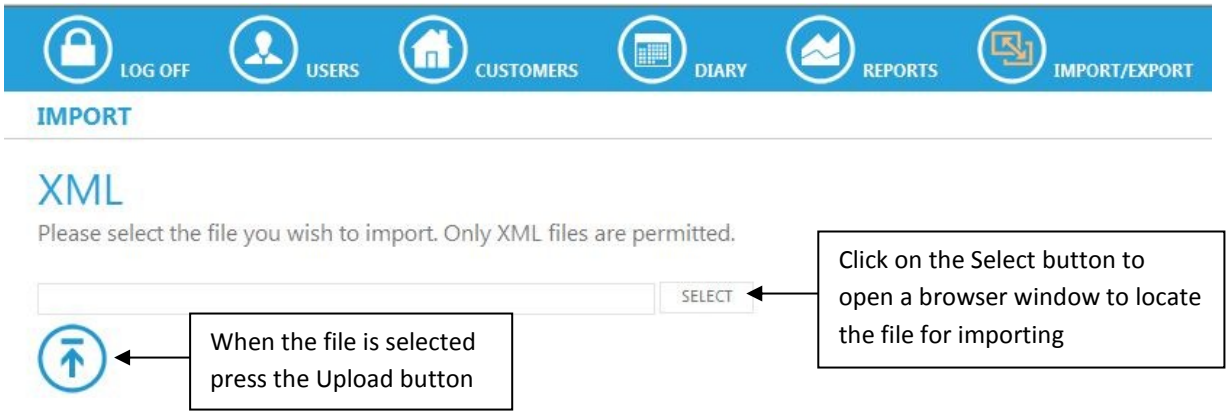
To open the Import/Export page, press the IMPORT/EXPORT button in the Application bar:



To navigate directly to either the Import or Export functionality, select from the drop down menu that appears when the cursor is held over the IMPORT/EXPORT button.

9.1 Importing data

Data such as User and Customer information can be uploaded to the system ONLY in xml format. If this is required, please contact Skillweb first for advice.


LOG OFF
USERS
CUSTOMERS
DIARY
REPORTS
IMPORT/EXPORT
IMPORT
XML
Please select the file you wish to import. Only XML files are permitted.
SELECT
Click on the Select button to open a browser window to locate the file for importing
When the file is selected press the Upload button

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9.2 Exporting data

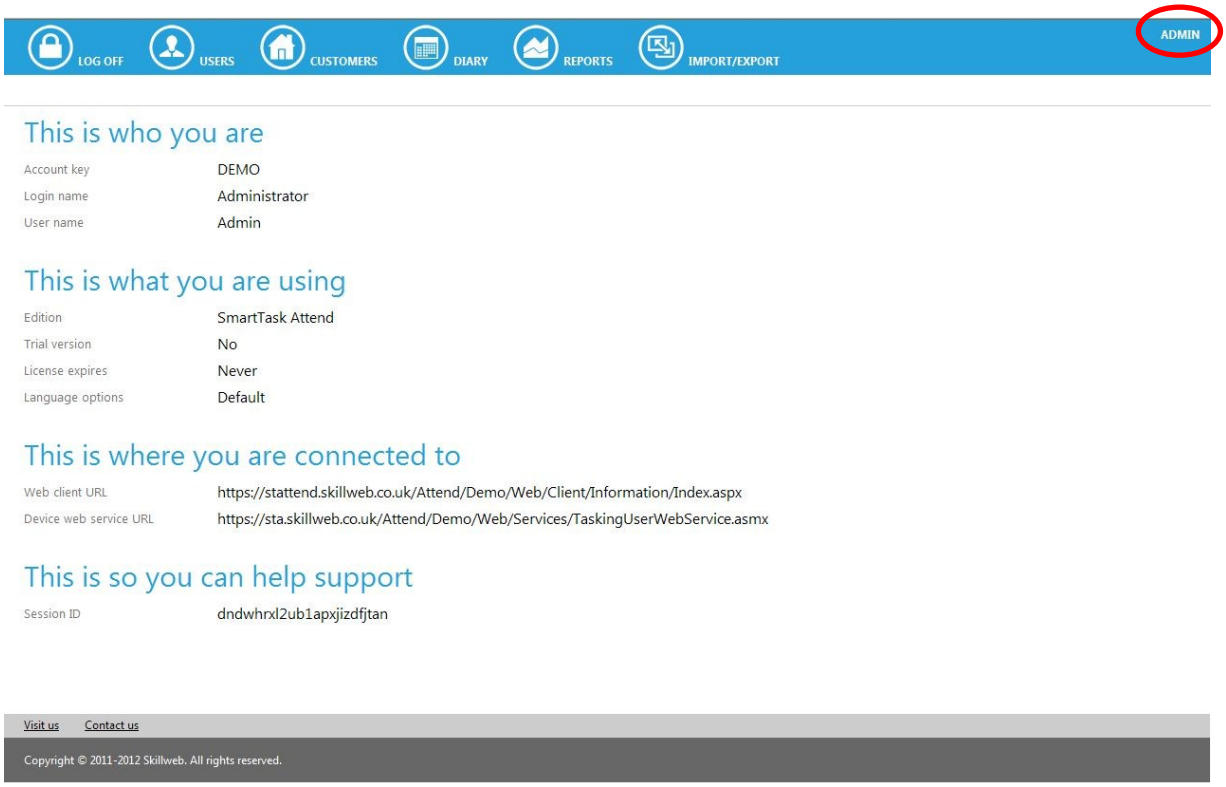
No export providers are currently configured. Please contact Skillweb for export options.

10 Log off

To log off, click the log off icon in the Application bar.

11 System support information

The following information screen is displayed when the username is clicked on in the top right-hand corner.



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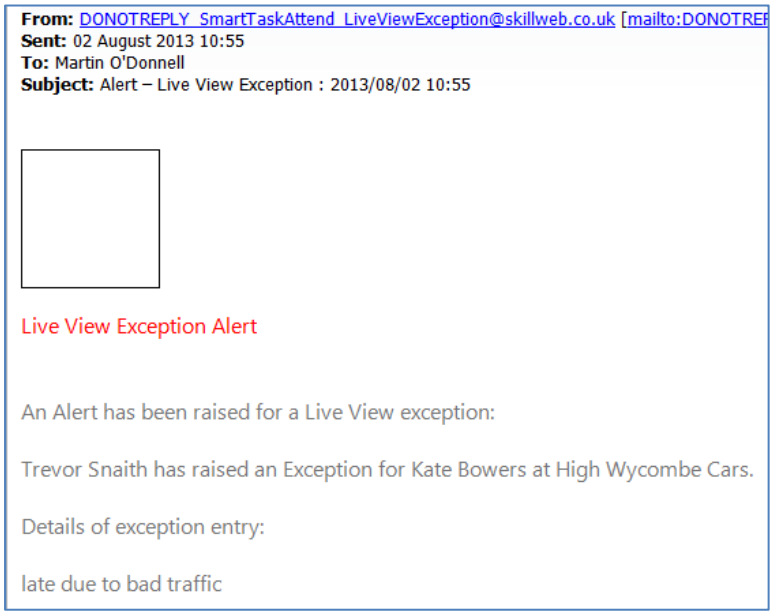
12 Email Alert Templates

The following alert is an example of what is received when alert has been set up


From: DONOTREPLY_SmartTaskAttend_LiveViewException@skillweb.co.uk [mailto:DONOTREP
Sent: 02 August 2013 10:55
To: Martin O'Donnell
Subject: Alert – Live View Exception : 2013/08/02 10:55

Live View Exception Alert

An Alert has been raised for a Live View exception:

Trevor Snaith has raised an Exception for Kate Bowers at High Wycombe Cars.

Details of exception entry:

late due to bad traffic

13 SmartTask Modules – more details

SmartTask Attend is a modular based product and is available in several configurations and can be purchased to fit the needs of organisations.

1. Attendance
2. Incident reports
3. Customer portal
4. Rostering & Live View Alerts
5. GPS

Contact Skillweb for more details Tele: 08700 707077 or email: info@skillweb.co.uk

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